IMPORTANT FINANCIAL DOCUMENTS CHECKLIST



When you meet with us, please try to bring along the following documents that apply to you.

Retirement Planning Documents

- □ Recent IRA. 40 1 (k), 403(b). TSA, Keogh statements
- □ Employee benefits program
- Deferred compensation and stock option agreements
- □ Pension and profit sharing statements
- □ Social Security Statements

Tax Planning Documents

- □ Tax returns for last year
- □ W-2 and a recent pay stub
- Estimated taxes

Financial Documents

- □ Savings account statements
- Mutual fund statements
- □ Brokerage account statements (Not statements for RJFS accounts housed by us)
- □ Investment documents
- □ Loan documents
- □ List of stocks held outside of brokerages
- □ Partnership agreements

Asset Protection Documents

- □ Life insurance policies and statements
- Disability, umbrella. and long term care insurance policies
- □ Annuity policies and statements

Estate Planning Documents

- □ Summary of your will, living will, durable powers of attorney and health care powers
- □ Living trusts

(Updates/Amendments only for anything previously given to us.)

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