DOCUMENTS NEEDED FOR FINANCIAL PLANNING

- [ ] Most recent employee paycheck stubs and benefit statements
- [ ] Statements from brokerage, mutual fund and other investment or savings accounts (checking account not necessary)
- [ ] Statements for profit sharing, pension, 401(k), 403(b), IRAs, deferred compensation or other such retirement or investment plans (including investment options)
- [ ] Most recent personal income tax return
- [ ] Mortgage statements /other debt statements
- [ ] Deferred compensation statements
- [ ] Most recent employee paycheck stubs and benefit statements
- [ ] Statement of estimated Social Security benefits (Go to www.ssa.gov)
- [ ] Pension projection statement from employer
- [ ] Stock options statements
- [ ] Deferred compensation statements
- [ ] Any previous analysis prepared regarding insurance planning, financial planning, or estate planning

NOTES