

## **Document Checklist**

### **Legal Documents (if applicable):**

- *Wills*
- *Trust Documents*
- *Business Agreements*

### **Bank Statements:**

- *Checking*
- *Savings*
- *CD's*

### **Brokerage Statements:**

- *Stocks and Bonds*
- *Mutual Funds*

### **Retirement Plan Statements:**

- *401(k)*
- *IRA*
- *SEP-IRA*
- *403(b)*
- *Most recent social security statement if available*

### **Insurance Policies:**

- *Life for all family members*
- *Disability*
- *Health*
- *Homeowners*
- *Umbrella*
- *Professional Liability Insurance (for those in the medical and legal profession)*

### **Employee Benefit Statements:**

- *Group Term Life Insurance*
- *Group Disability Insurance*
- *Projected Pension*

### **Paystubs (last two):**

- *Self*
- *Spouse*

### **Federal and State Income Tax Returns (last two years)**

- *Personal*
- *Business (if applicable)*

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