

Document Request Form

Personal Assets

Most Recent Statements for:

- Bank Accounts – Checking & Savings
- Brokerage Accounts
- Money Markets
- Stocks, Bonds, Mutual Funds
- Employee Stock Options
- Annuities
- CD's
- Other

Retirement Assets

Most Recent Statements for:

- Employer Plans – 401k, 403b, etc
- Pension
- IRA's – Traditional & Roth
- Deferred Compensation
- Other

Liabilities / Loans

Most Recent Statements for:

- Mortgage
- Home Equity Loan / Line of Credit
- Personal Loan
- Credit Cards
- Other

Estate Planning

- Wills
- Power of Attorney
- Living Wills / Advanced Healthcare Directives
- Trusts

Insurance / Tax Returns / Other

- Declaration pages of insurance coverages
 - May include: Health, Life, Auto, Disability, Homeowners, Umbrella, Long Term Care
- Copies of the last 2 years Federal & State Tax Returns
- Most Recent Pay Stubs
- Most Recent Social Security Statements

Business Owners

- Current Federal & State Tax Returns
- Current Financial Statements
- Buy-Sell Agreements