



## **Document Checklist**

### **Financial Planning, Retirement and Wealth Management**

- Most Recent Statements for 401(k), 403(b), SEP, IRA, Pension, (Retirement Asset Accounts).
- Most Recent Investment Account Statements, (Brokerage/Mutual Fund/Separate or Managed Accts.).
- Current Copy of Will, Trusts, Power of Attorney.
- Copy of any Annuity, Life Insurance, Disability or Long Term Care contract or policy.
- Copy of any Tax Deferred or Immediate Annuity account statements.
- Copy of any Business Buy Sell Agreement. (Buy -out agreement).
- Copy of any Executive Benefit Program or Deferred Compensation, or Executive Stock Program.
- Copy of any Children's/Grandchildren College or I.R.C. 529 accounts.
- Copy Last (2) Years Federal Income Tax Return.
- Personal Balance Sheet.
- Copy of last year's Social Security Statement
- Business Balance Sheet and/or prior year P. & L.

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