

Documents Needed for Planning

Investment Statements/Information

- Mutual Funds
- Individual Equity & Bond Holdings
- Savings Accounts/CDs/Money Market Funds
- Checking Accounts
- Corporate Savings and Thrift Programs
- Vested Pension Program Amounts

Company Benefits Booklets/Employee Benefit Program Descriptions

- Group Health Insurance
- Group /Individual Disability Income Insurance
- Deferred Compensation Plans
- Pension and Profit Sharing Plans

Insurance and Annuity Contracts

- Life Insurance
- Qualified/Nonqualified Annuities
- Disability Income
- Long Term Care
- Property and Casualty Declaration Pages

Estate Planning

- Wills
- Living Wills and trust Directives
- Revocable/Irrevocable Trusts
- General/Durable Power of Attorney
- Financial/Health Care Power of Attorney
- Family Limited Partnership

Income/Cash Flow

- Most Recent Paycheck Stubs
- Last two years Income Tax Returns

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- Cash Flow Worksheet

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