

Supporting Document Checklist

Documents for Building a Financial Plan

The documents listed below are a critical part of building a Financial Plan for you. Please provide us with the ones that are pertinent to your situation.

INDIVIDUAL STATEMENTS	BUSINESS DOCUMENTS
<input type="checkbox"/> Pay Stubs	<input type="checkbox"/> Certified Business Valuations
<input type="checkbox"/> Brokerage & Investment Statements	<input type="checkbox"/> Buy-Sell Agreements
<input type="checkbox"/> Annuity Statements	<input type="checkbox"/> Corporate Census
<input type="checkbox"/> Insurance Statements – Life, Disability, Long Term Care, Auto, Home and Umbrella	<input type="checkbox"/> Employee Benefits
<input type="checkbox"/> Stock Option Statements	<input type="checkbox"/> Financial Statements
<input type="checkbox"/> Wills, Trusts and Estate Documents	<input type="checkbox"/> Corporate Tax Returns
<input type="checkbox"/> Employer Benefits Summary	<input type="checkbox"/> Employee Agreements
<input type="checkbox"/> Last Year's Tax Return	<input type="checkbox"/> Applicable Insurance