

## **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
☐ Pay Stubs	☐ Certified Business Valuations
☐ Brokerage & Investment Statements	☐ Buy-Sell Agreements
☐ Annuity Statements	☐ Corporate Census
☐ Insurance Statements — Life, Disability, Long Term Care, Auto, Home and Umbrella	☐ Employee Benefits
	☐ Financial Statements
☐ Stock Option Statements	☐ Corporate Tax Returns
☐ Wills, Trusts and Estate Documents	☐ Employee Agreements
☐ Employer Benefits Summary	☐ Applicable Insurance
☐ Last Year's Tax Return	

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