

DOCUMENTS NEEDED

YES N/A

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Most recent federal and state tax returns, all schedules. |
| <input type="checkbox"/> | <input type="checkbox"/> | Bank and brokerage statements with details of investment holdings. |
| <input type="checkbox"/> | <input type="checkbox"/> | 401(k), 403(b), 457 and IRA (Regular, SEP, Roth, Simple) pension statements. |
| <input type="checkbox"/> | <input type="checkbox"/> | Pay stubs(s) covering the last 30 days. |
| <input type="checkbox"/> | <input type="checkbox"/> | Latest Year W2 Form |
| <input type="checkbox"/> | <input type="checkbox"/> | Trust documents |
| <input type="checkbox"/> | <input type="checkbox"/> | Employee benefits package/booklet. |
| <input type="checkbox"/> | <input type="checkbox"/> | Social Security Administration Estimate of Benefits form. |
| <input type="checkbox"/> | <input type="checkbox"/> | Statement of estimated pension benefits. |
| <input type="checkbox"/> | <input type="checkbox"/> | Annuity statements. |
| <input type="checkbox"/> | <input type="checkbox"/> | Copies of personal insurance declaration statements: Auto, home, liability, flood. |
| <input type="checkbox"/> | <input type="checkbox"/> | Copies of life, disability, long-term care insurance policies. |
| <input type="checkbox"/> | <input type="checkbox"/> | Information regarding medical insurance: premium, benefits. |
| <input type="checkbox"/> | <input type="checkbox"/> | For self-employed – Projections for income for next 5 years. |
| <input type="checkbox"/> | <input type="checkbox"/> | For self-employed – P&L for current year. |
| <input type="checkbox"/> | <input type="checkbox"/> | Mortgage: Latest billing statement and original document (if can locate easily). |
| <input type="checkbox"/> | <input type="checkbox"/> | Equity Line of Credit: Latest billing statement and original document. |

If you don't have time to make copies of the above documents, bring the originals. They will be scanned and returned to you promptly.