DOCUMENT CHECKLIST

You do not need to make copies of these documents. If you provide us with the original documents, we will scan what we need and return the originals to you.

- **Personal Information**
  ☐ Completed Personal Information Data Sheet (see page 1)
  ☐ Copy of Driver's License

- **Cash Flow Information**
  ☐ Paycheck Stubs (2 most recent)

- **Tax Returns**
  ☐ Personal Income Tax Returns From Previous 3 Years (Federal and State with schedules attached)

- **Account Statements for Assets**
  ☐ Bank Accounts (checking, savings, money market, CDs)
  ☐ Brokerage/Mutual Fund Accounts
    - Include a list of available investment options where applicable.

  ☐ Retirement Plans (Traditional IRA, Roth IRA, 401k, 403b, 457b, TSP, Pensions, Deferred Comp)
    - Include a list of available investment options where applicable.

  ☐ Annuities (immediate, fixed, variable)
  ☐ Social Security Statements
  ☐ Accounts For Children (529 plans, prepaid tuition plans, UGMAs, UTMAs)

- **Account Statements for Liabilities**
  ☐ Mortgages
  ☐ Equity Lines or Loans
  ☐ Car Loans
  ☐ Student Loans
  ☐ Credit Cards
  ☐ Other Debts

- **Insurance Policy Information**
  ☐ Life (group, term, whole, universal, variable)
  ☐ Disability (individual, group, short-term, long-term)
  ☐ Automobile
  ☐ Homeowners/Renters
  ☐ Umbrella Liability

- **Estate Documents**
  ☐ Wills
  ☐ Durable Powers of Attorney
  ☐ Advanced Medical Directives
  ☐ Trust Documents