INFORMATION GATHERING CHECKLIST

This document includes a list of information our wealth management team will generally need to begin working on your financial plan. Although not required, it is helpful if you bring copies of these documents to your initial meeting with your wealth management advisor.

- ☐ Two recent, sequential paycheck stubs
- ☐ Most recent statement for all retirement accounts [401(k), IRA, etc.]
- ☐ Most recent statement for all investment accounts (including custodial and education accounts, if applicable)
- ☐ Most recent federal tax return
- ☐ Real Estate
- ☐ Mortgage and loan statements
- ☐ Life and health insurance statements (life, disability income, long-term care)
- ☐ Employee benefits annual statement or benefits handbook
- ☐ Social security benefit statement — you can create a “My Social Security” account and access your benefit information at https://www.ssa.gov/myaccount/
- ☐ Estate planning documents (Wills, trusts, powers of attorney, etc.)
- ☐ Personal cash flow (see included budget)
- ☐ Financial statement for business(es) you own (if applicable)