- ☐ Current statements for all (if applicable):
    - o Checking accounts
    - o Savings accounts
    - o Money market accounts
    - o CDs
    - o Mutual funds
    - o Brokerage accounts
    - o IRAs
    - o SEPs / SIMPLEs
    - o Trusts
    - o Other investments
- ☐ Life insurance policies / contracts
- ☐ Annuity policies / contracts
- ☐ Cost basis of investments listed above
- ☐ 401k / retirement plan / pension plan statements
- ☐ Employee benefit information
- ☐ Previous two year’s tax returns
- ☐ Most recent social security statement
- ☐ A copy of your credit report (you may obtain a free copy at http://www.annualcreditreport.com.)
- ☐ Wills, trusts, powers of attorney (durable / healthcare / financial)
- ☐ Any other items you believe may be important in assisting you with your financial planning issues
- ☐ Names and contact information for professionals used in the past for tax, law, and insurance
- ☐ Names and contact information for any other financial advisors you may have.
- ☐ One recent month worth of paystubs