

CHECKLIST

<input type="checkbox"/> Completed Data Gathering Form
<input type="checkbox"/> Tax Returns for Prior 2 Years
<input type="checkbox"/> Paycheck Stubs for Past 2 Years
<input type="checkbox"/> Company Benefits Booklet(s)
<input type="checkbox"/> Company Benefits Statement (Annual Personal Statement of Benefits)
<input type="checkbox"/> Company Retirement Plan Information (e.g. 401k, 403b)
<input type="checkbox"/> Stock-Option Agreements
<input type="checkbox"/> Recent Statement for: <ul style="list-style-type: none"> <input type="checkbox"/> Mutual Funds <input type="checkbox"/> Brokerage Accounts <input type="checkbox"/> Bank Accounts (Checking, Savings, Money Market, CDs) <input type="checkbox"/> Retirement and/or Pension Plans <input type="checkbox"/> Education Plans
<input type="checkbox"/> Escrow Reconciliation Statements (Mortgages)
<input type="checkbox"/> Latest Estimate From Social Security Administration
<input type="checkbox"/> Copies of Annuity Contracts
<input type="checkbox"/> Copies of Insurance Documents <ul style="list-style-type: none"> <input type="checkbox"/> Life Insurance <input type="checkbox"/> Disability Insurance <input type="checkbox"/> Homeowners Insurance <input type="checkbox"/> Vehicle Insurance <input type="checkbox"/> Boat or Other Insurance <input type="checkbox"/> Umbrella Insurance
<input type="checkbox"/> Loan or Lease Agreements
<input type="checkbox"/> Will and Trust Documents
<input type="checkbox"/> Power of Attorney Documents

Additional Comments: