

REQUESTED DOCUMENTS

* Please provide the most recent of the items below:

Estate Planning Docs	
	Wills
	Trusts
	Powers of Attorney
	Living Wills

Income Docs	
	Pay Stubs / 1099's
	Tax Return
	Social Security Statements (avail. @ ssa.gov)
	Pension Projection

Insurance Docs	
	Life Insurance Statements / Policies
	Health Insurance Statements / Policies
	Long Term Care Insurance Policies
	Long Term Disability Policies
	Home / Auto / Liability Insurance Declaration Pages
	Business Insurance Policies

Investment Docs	
	Bank Account Statements
	CD's
	Investment Statements (401k, IRA's, non-IRA's, 529, Annuities, 403b, Coverdell, UTMA)
	Stock Option Statements
	Stock/Bond Certificates

Liability Docs	
	Mortgage Statement (Inc. home equity loans and lines of credit)
	Vehicle Loan Statements
	Student Loan Statements
	Credit Card Statements
	Other Loan Statements
	List of Monthly Expenses (Quicken, Excel, etc.)