

## Checklist of Documents

*Please provide [copies without staples](#) or [PDF documents](#) of the following documents:*

- Last 2 years of federal & state tax returns, including schedules & W-2s
- Most recent:
  - Paycheck stubs
  - Bank statements – checking, savings, CDs
  - Brokerage & mutual fund statements
  - Employer retirement plan statements
  - IRA statements
- Loan documents – mortgage, home equity, auto, education
- List of your credit cards (where you carry a balance) – see worksheet
- Social Security statements
- Employee benefit booklet and/or benefit statements (*You may want to provide me with the web address instead of making copies*)
- Employer retirement plan investment choices
- Beneficiary forms - employer retirement plan, IRAs, life insurance
- Declarations page of insurance policies – auto, home, life, health, disability, umbrella, professional liability, long term care
- Legal documents – will, powers of attorney, living will, divorce agreement, trust, relationship agreement, pre/post nuptial
- Additional documentation as applicable to your specific situation

*Please bring with you (no need to copy):*

- Policy booklets of insurance policies – auto, home, life, health, disability, umbrella, professional liability, long term care