Document Checklist

To ensure that we have a complete overview of your financial picture, please provide all documents on this checklist. Feel free to let us know if you need assistance or have any questions.

- [ ] 1. Complete Client Profile Information *(Form Attached)*
- [ ] 2. Individual Income Tax Return *(Federal Most Recent)*
- [ ] 3. Gift Tax Return *(Federal Most Recent)*
- [ ] 4. Entity Income Tax Returns *(Federal Most Recent)*
    - Corporations
    - LLCs
    - Other
- [ ] 5. Personal Financial Statement *(If available, otherwise please fill out attached Financial Statement.)*
- [ ] 6. Life Insurance Policies with last premium notice or statement
- [ ] 7. Disability Insurance Policies
- [ ] 8. Long Term Care Insurance Policies
- [ ] 9. Will and Trust Documents
- [ ] 10. Prenuptial Agreement
- [ ] 11. Durable Powers of Attorney, Living Wills, Healthcare Proxies
- [ ] 12. Business Agreements
    - Valuation Reports
    - Buy Sell Agreement
    - Salary Continuation
    - Deferred Compensation Agreement
- [ ] 13. Last Monthly Investment Statement for Each Brokerage, Bank and Retirement Account
- [ ] 14. Complete Current Monthly Cash Flow *(Form Attached)*

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Helping Business Owners and Families
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