



Personal Financial Planning Checklist

Please provide current copies of the following documents:

(This is a general list and therefore all documents listed may not be applicable to your specific situation)

Legal Documents:

- Current wills
- Powers of Attorney
- Trust documents
- Additional estate related documents (ie. FLP documentation)

Statements:

- Brokerage Accounts
- Bank Accounts
- Life Insurance
- Disability
- Social Security
- Financial Statement
- Mortgage

Tax Returns:

- Current Year
- Prior Year

Business Related Documents:

- Buy Sell Agreement
- Financial Statement
- Employee Benefits information
- Insurance

Property and Casualty Statements:

- Car Insurance
- Homeowners
- Umbrella Policy