



# DOCUMENT CHECKLIST

## Please Provide the Following if Available

- **Recent Paystubs**
- **Federal and State income tax returns with W2s**
- **Current mortgage statement**
- **Statement of CDs, savings bonds, money market, and savings accounts**
- **Statements of investments accounts (stocks, bonds, mutual funds, etc.)**
- **Statement of 401(k), 403(b), 457, IRAs, Roth IRAs, and other retirement & pension plans**
- **Life insurance policies recent annual statement (term and permanent)**
- **Disability policies (group summary and recent annual statement)**
- **Current estate plan (will, trust, powers of attorney)**
- **Current employer sponsored benefits summary**
- **Long-term care and home health care plans**

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