



8 Documents Necessary for Your Personalized Financial Plan

This checklist includes the most common documents necessary to evaluate your financial situation and create your family's financial plan. You can tackle the list in a couple hours, or a little at a time. If you have any questions, we are here to help!

- Family Budget and Balance sheet
- List of insurances currently in force, values and annual premium amounts, or scanned copies of each policy for:
 - Health insurance
 - Homeowners
 - Auto
 - Personal Liability
 - Personally owned life insurance & company provided life insurance
 - Personally owned disability insurance & company provided disability insurance
- List of estate planning documents, and whether they reflect your current wishes.
- Paystubs for each earner
- Copy of two most recent tax returns
- Copies of statements for all investment and retirement accounts
- Pension plan documents
- Other documents required for your plan