# CHECKLIST – PERSONAL FINANCIAL PROFILE

So that we can complete your Personal Financial Profile, it is essential that your provide as many of the following documents as possible:

- ❑ Recent Statements from all of your current investments
- ❑ Recent Statements from your Employer's Retirement Plans
  (401(k), Profit Sharing, Stock Purchase Program, 403(b))
- ❑ Recent Statements from any 529 / College Savings Plans
- ❑ Copy of all Insurance Policies
  (Life Insurance, Disability, Long Term Care)
- ❑ List of any/all properties and values, including Mortgage Statement
- ❑ Copy of previous 2 years Tax Returns
  (Form 1040 and attached schedules)
- ❑ Copy of most recent Social Security Statement of Benefits
- ❑ Copy of your most recent Trust(s) / Will(s) / Power of Attorney documents