

In order to better understand your financial situation, please provide the following documents. Keep in mind that some of these items may not be applicable to your situation. Feel free to reach out to us with any questions.

Important Documents

- Existing Will, Health Care Proxy, and Power Of Attorney
- Trust and Estate Documents
- Two Most Recent Income Tax Returns

Account Statements

- Bank accounts
- Investment accounts
- IRA, 401(k), 403(b) Statements
- Social Security Benefit Statement
- Annuity Statements
- Pension Plan Statements

Insurance Policies

- Life Insurance
- Disability Insurance
- Long Term Care Insurance