

## List of Financial Documents

**Please gather and upload the following documents to your advisor** at least one business day prior to our scheduled meeting.

### Personal

- |  |  |
|--|--|
| <input type="checkbox"/> Pay stub(s)                         | <input type="checkbox"/> Other Group Benefits    |
| <input type="checkbox"/> Tax Return                          |  |
| <input type="checkbox"/> Auto Ins declarations               |  |
| <input type="checkbox"/> Homeowners Ins declaration pg       |  |
| <input type="checkbox"/> Personal Liability Ins              |  |
| <input type="checkbox"/> Medical Ins Info Packet             | <input type="checkbox"/> Tax Return              |
| <input type="checkbox"/> Investment statements               | <input type="checkbox"/> Business Liability Ins  |
| <input type="checkbox"/> Debt statements                     | <input type="checkbox"/> Business Property Ins   |
| <input type="checkbox"/> Mortgage statement(s)               | <input type="checkbox"/> Debt statements         |
| <input type="checkbox"/> Wills, Trusts, Estate Planning Docs | <input type="checkbox"/> Profit & Loss statement |
| <input type="checkbox"/> Supplemental Ins (i.e. AFLAC)       |  |
| <input type="checkbox"/> Disability Insurance Policies       |  |
| <input type="checkbox"/> Life Insurance Policies             |  |

### Business Owners