Document Checklist

Legal Documents (if applicable):

- *Wills*
- *Trust Documents*
- *Business Agreements*

Bank Statements:

- *Checking*
- *Savings*
- *CD's*

Brokerage Statements:

- *Stocks and Bonds*
- *Mutual Funds*

Retirement Plan Statements:

- *401(k)*
- *IRA*
- *SEP-IRA*
- *403(b)*
- *Most recent social security statement if available*

Insurance Policies:

- *Life for all family members*
- *Disability*
- *Health*
- *Homeowners*
- *Umbrella*
- *Professional Liability Insurance (for those in the medical and legal profession)*

Employee Benefit Statements:

- *Group Term Life Insurance*
- *Group Disability Insurance*
- *Projected Pension*

Paystubs (last two):

- *Self*
- *Spouse*

Federal and State Income Tax Returns (last two years)

- *Personal*
- *Business (if applicable)*

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