EVARD
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Documents Needed for Planning

The following documents will be needed for analysis to prepare a financial plan for you.
It will be treated with confidentiality and returned when the planning process is complete.

_____ Most Recent Payroll Stub
_____ Last 2 years Tax Returns
_____ Company Benefit Booklets (Group and Pension Plans)
_____ Wills
_____ Trust Arrangements
_____ Mortgage Statement (Personal and Investments)
_____ Social Security Statement
_____ Auto Loans
_____ Any Other Outstanding Debt

INSURANCE & ANNUITY CONTRACTS

_____ Life Insurance
_____ Health Insurance
_____ Disability Insurance
_____ Auto Insurance
_____ Home Owners Insurance
_____ Long-Term Care Insurance
_____ Annuity Contracts and Recent Statement

SAVINGS – INVESTMENTS – RETIREMENT ACCOUNT STATEMENTS

_____ Bank Account and Savings Statements
_____ Certificates of Deposit
_____ Mutual Funds
_____ Stocks, Bonds & Brokerage Accounts
_____ Retirement, IRA, 401K, 403B, TSA and Pensions
_____ Investment Property Information (Values, Taxes, and Rental Incomes)