YOUR DOCUMENT CHECKLIST

o	Statements from pensions or other employer-benefit income that you receive
o	Life and disability insurance policy
o	Long-term care insurance policy
o	Statements from bank accounts (summary pages)
o	Statements from investment/brokerage accounts
o	Statements from retirement accounts and employer-sponsored benefit programs (401(k), 403(b), 457, etc.)
o	Statements from annuities you own
o	Outstanding balances of loans (mortgage, auto, credit card, business, equity line, etc.)
o	List of estate planning documents (will, power of attorney, trust, etc.)
o	List of Real Estate Holdings
o	Estimated Business Valuation
o	Contact information of your CPA and attorneys or other financial professionals (tax and estate) if applicable
o	Other ____

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