



Financial Planning Document Checklist

The following documents are typically helpful in our analysis and preparation of your personalized plan. You have our assurance that this material will be treated confidentially.

From your

Personal Files

- Personal Financial Statement** (if available)
 - Budget** (if available)
 - Latest tax returns** (or sign consent form for Wilkins Miller Hieronymus LLC to supply your returns)
 - Loan documents**
 - Wills**
 - Trust Agreements**
 - Other** _____
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Employer

- Payroll or other income statements**
 - Recent retirement plan statements**
 - Information on employer provided life, long-term care, and disability insurance**
 - Other** _____
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Bank/Credit Union

- Checking accounts statements**
 - Savings/CDs/Money Market statements**
 - Other** _____
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Brokerage/Mutual Fund

- Recent monthly statement**
 - Latest year-end statement**
 - Recent annuity statements**
 - Other** _____
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Insurance

- Recent life insurance statements** (and contracts if available)
 - Recent annuity statements** (and contracts if available)
 - Disability policy**
 - Long-term care policy**
 - Other** _____
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Business

- Copy of succession plan** (including buy-sell agreement if one is in place.)
- Deferred compensation agreements**
- Stock/Option/Bonus plans**
- Other** _____