CLIENT DATA CHECKLIST

- ❐ INDIVIDUAL TAX RETURNS
- ❐ BUSINESS AND PARTNERSHIP TAX RETURNS
- ❐ CURRENT BROKERAGE STATEMENTS
- ❐ RETIREMENT STATEMENTS (IRA / 401k / PENSION)
- ❐ CURRENT BANK STATEMENTS
- ❐ LIFE & DISABILITY INSURANCE POLICIES
- ❐ PERSONAL FINANCIAL STATEMENT
- ❐ BUSINESS FINANCIALS
- ❐ BUSINESS AGREEMENTS – LLC'S, PARTNERSHIPS, CORPORATIONS
- ❐ CURRENT ESTATE DOCUMENTS, INCLUDING POWER OF ATTORNEY FOR HEALTH & FINANCIAL MATTERS
- ❐ MORTGAGE INFORMATION
- ❐ EMPLOYEE BENEFIT INFORMATION
- ❐ EMPLOYMENT LETTER OF UNDERSTANDING
- ❐ CONTACT INFORMATION FOR YOUR ACCOUNTANT, ATTORNEY, AND KEY ADVISORS
- ❐ OTHER