

### Document Checklist

The following documents will be needed to properly study, analyze, and prepare your unique personal plan. All materials will be treated confidentially. Electronic files may be uploaded directly to your eMoney planning account. Any hard copies will be returned when the planning process is completed, or earlier if requested.

#### Personal Information

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- |  |   |
|--|---|
| <input type="checkbox"/> Most Recent Tax Returns | <input type="checkbox"/> Trust Agreements             |
| <input type="checkbox"/> Loan Documents          | <input type="checkbox"/> Major Asset Purchase Details |
| <input type="checkbox"/> Wills                   | <input type="checkbox"/> Other _____                  |

#### Employment Information

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- |  |   |
|--|---|
| <input type="checkbox"/> Paystubs or Other Income Statements | <input type="checkbox"/> Pension Plans              |
| <input type="checkbox"/> Employee Benefits Booklets          | <input type="checkbox"/> Social Security Statements |
| <input type="checkbox"/> Retirement Savings Plans            | <input type="checkbox"/> Other _____                |

#### Bank or Credit Union Information

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- |   |   |
|---|---|
| <input type="checkbox"/> Checking Account Statements      | <input type="checkbox"/> Credit Card Statements |
| <input type="checkbox"/> Savings / CDs / Money Statements | <input type="checkbox"/> Other _____            |

#### Broker or Mutual Fund Information

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- |   |                                      |
|---|--------------------------------------|
| <input type="checkbox"/> Most Recent Statements | <input type="checkbox"/> Other _____ |
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#### Insurance Information

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|---|---|
| <input type="checkbox"/> Most Recent Life Insurance Statements      | <input type="checkbox"/> Property & Casualty Policies |
| <input type="checkbox"/> Most Recent Annuity Statements             | <input type="checkbox"/> Long Term Care Policies      |
| <input type="checkbox"/> Health / Hospital / Major Medical Policies | <input type="checkbox"/> Other _____                  |
| <input type="checkbox"/> Disability Income Policies                 | <input type="checkbox"/> Other _____                  |

#### Business Information

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- |   |   |
|---|---|
| <input type="checkbox"/> Buy-Sell Agreements              | <input type="checkbox"/> Stock / Option / Bonus Plans |
| <input type="checkbox"/> Deferred Compensation Agreements | <input type="checkbox"/> Other _____                  |

#### Additional Comments:

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Revised 1/6/2023

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