***DOCUMENT LIST***

As we begin to work together, the assistance I can provide is directly dependent on you. Below is a list of documents that you and your spouse will need to provide as soon as possible. Please scan and email, fax or put in locked box on office front porch.

1. If CIS have already been completed, provide copies
2. Complete expected future expenses in FLS line I emailed you
3. 3 years of tax returns with all supporting schedules and W-2s
4. Last 3 month’s statements on all investment accounts
5. Last 3 month’s statements for all bank accounts, checking and/or savings
6. Most recent three statements from any employee retirement plan, pension, or deferred comp plan
7. Most recent statement on any Employee Stock Option, Employee Stock Purchase Plan, or Restricted Stock accounts.
8. Most recent mortgage statement
9. Most recent pay stubs for each party
10. Last 3 month’s statements for any and all credit cards with balances.
11. Copies of most recent statements for any outstanding loans.
12. Policy statements or information on any and all Life Insurance, Annuities, or Cash Value Insurance
13. Social Security Estimate statements for both parties. These are available at [www.SSA.gov](http://www.SSA.gov)
14. For any businesses owned, a full Profit and Loss Statement for current and previous years.
15. Most recent Insurance Policies for all autos owned that show VIN numbers.

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