

## Personal Information Checklist

In order for us to construct your personal financial model we will need some information about your current status. Please bring the information checked below to our next meeting. All of your personal information will be handled with the strictest confidence and returned to you in the same condition we received it.

### Personal:

- Auto, Homeowner's, Liability, Disability, Major Medical, and Life Insurance
- All Personal Insurance Policies
- Company provided group benefits
- Wills and Trust documents
- Current statements for all investments
- Most recent paycheck stub for you and your spouse
- Personal tax returns for past 2 years

### Business Owners:

- Business tax returns for past 2 years
- Business financial statements for past 2 years
- Business life insurance or agreements