BEYOND
Wealth Management

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Documents Needed

Please provide the following documents to help us analyze, and prepare a personal plan for you. This material will be treated confidentially and returned when the planning process is completed, or earlier if requested. Send us what you have now to get started, and we can gather the rest as we go. **Don't let not having something hold you up**.

- ☐ Latest income tax returns: personal and business
- ☐ Loan Statement: mortgage, personal loans, business loans
- ☐ Wills
- ☐ Trust Documents
- ☐ Other ___________________

- ☐ Payroll or other income statements
- ☐ Pay stub
- ☐ Employee benefits booklet
- ☐ Retirement account statements
- ☐ Pension plans
- ☐ Other ___________________

- ☐ How much cash do you have in checking
(not intended to be spent on bills this month) $ ______________________
- ☐ How much cash do you have in savings
(not intended to be spent on bills this month) $ ______________________
- ☐ Credit Card statements
- ☐ Other ___________________

- ☐ Investment statements
- ☐ Annuity Statements

- ☐ Life insurance policies and recent statements if available
- ☐ Disability income insurance policy information
- ☐ Car, home, and liability insurance declaration pages
- ☐ Long-Term Care policy information
- ☐ Social Security statements (available at ssa.gov)

Additional documents needed from business owners

- ☐ Partnership agreements if applicable
- ☐ Buy-Sell Agreements
- ☐ Deferred Compensation Agreements
- ☐ 2-3 years of corporate tax returns for all entities
- ☐ Last year's P&L and Balance Sheet, each entity
- ☐ Year to date P&L and Balance Sheet, each entity
- ☐ Other ________________

Additional Comments