
DOCUMENT CHECKLIST

Please send/bring a copy of the following documents, as applicable, for you and your spouse/companion.

Please provide documents relevant to your situation:

- _____ Income tax returns and gift tax returns, federal and state, for prior two years
 - _____ Paycheck voucher(s) for one full month
 - _____ Mortgage statement with terms and interest rate
 - _____ Wills (yours and your spouse's/companion's)
 - _____ Wills of other family members
 - _____ Trust instruments (e.g. Personal Residence Trust Document)
 - _____ Powers of Attorney
 - _____ Leases on property on which you are lesser or lessee
 - _____ Partnership Agreements
 - _____ Personal balance sheets and income statement for last year, if any were prepared
 - _____ Recent cash account and brokerage statements
 - _____ Divorce decrees
 - _____ Prenuptial or postnuptial agreements
 - _____ Instruments creating power of appointment of which you are donee
 - _____ Copies of employment contracts
 - _____ Balance sheets, profit and loss statements, and tax returns for most recent year of all businesses in which you have proprietary interest
 - _____ Documents evidencing interests in employer's pension or other benefit plans
 - _____ Closely-held business buy-sell agreement
 - _____ Most recent statements from insurance companies
 - _____ Federal estate tax returns related to inherited property
 - _____ Taxable income projections of limited partnerships in which you have invested
 - _____ Declarations page of all insurance policies
- Life
Health
Homeowners
Automobile
Excess Liability

PLAN TO LIVE WELLSM

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