



DOCUMENT LIST

As we begin to work together, the assistance I can provide is directly dependent on you. I can only provide a thorough analysis if I have all the information necessary to do so. Below is a list of documents that you and your spouse will need to provide as soon as possible. Feel free to scan and email anything you can and don't feel the need to send everything at once. If it's easier to do a little at a time, that's fine.

1. If Financial Affidavits have already been completed, provide copies
2. Fully Completed "Financial Information" Packet
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
14. For any businesses owned, a full Profit and Loss Statement for current and previous years as well as
15. Most recent Insurance Policies for all autos owned that show VIN numbers. Write in current mileage on vehicle.