

## Documents Needed

- Asset Allocation Questionnaire
- Pension Statements with survivorship and age-based options
- Social Security Statements
- 2 Most Recent Paystubs
- Tax Returns (Previous Year)
- Net Worth Statement (if available)
- Life Insurance Statement(s)
- Disability Insurance Statement(s)
- Long-Term Care Insurance Statement(s)
- Retirement Account Statements (with investment holdings)
- Other Investment Account Statements (with investment holdings)
- Wills, Trusts, Codicils
  
- Buy-Sell Agreements
- Deferred Compensation Agreements
- Profit Sharing Outline
- Employee Census Data
- Form 5500

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