

Check Box As You Gather Each Document:

- Personal Income Tax Returns**
- Paying Stub(s) For You And Your Spouse
Showing Deductions From Gross Income**
- Wills and Trust Documents**
- All Personal Insurance Policies**
 - Automobile Policies (Include Declarations Of Coverage)**
 - Homeowner's or Renter's Policy (Include Declarations Of Coverage)**
 - Disability Income Policies**
 - Hospitalization and Major Medical Policies**
 - Life Insurance Policies (For All Members Of Your Family)**
- Annual Statements / - Loan Statements
- Any Other Types Of Insurance Policies**
- Most Recent Government Plan Statements**
- Most Recent Mortgage Statements**
- Employer Provided Group Benefits For You And Your Spouse
(Please Include A Printout Of Specific Coverage's If Available)**
- Current Account Statements (For Savings, Retirement, Investments, etc.)**

For Business Owners Only:

- Business Life Insurance Policies**
- Business Income Tax Returns**
- Business Financial Statements**
- Buy - Sell Agreements**
- Business Agreements (ie: Key Person, Deferred Compensation, etc.)**

The idea is to be honest with yourself about where you currently are in each of those five key areas compared to where you'd like to be. Even if you don't feel good about where you are currently in each area, understanding your current state will help you forge the path forward to what you wish to accomplish.