FPS | Financial Planning Solutions, Inc

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# DOCUMENTS NEEDED FOR FINANCIAL PLANNING

THE FOLLOWING DOCUMENTS WILL BE NEEDED FOR THE PURPOSE OF STUDY AND ANALYSIS IN AN EFFORT TO PREPARE A PERSONAL FINANCIAL PLAN FOR YOU. IT IS UNDERSTOOD THAT THIS MATERIAL WILL BE TREATED CONFIDENTIALLY AND RETURNED AS SOON AS THE PLANNING PROCESS IS COMPLETED, OR AT AN EARLIER TIME IF REQUESTED.

ITEMS RECEIVED FROM ______________________________________________

Most Recent Payroll Stub
- ❑ Self
- ❑ Spouse

Income Tax Returns for the Last Three Years
- ❑ Self
- ❑ Spouse

Personal Employment Benefit Statements
- ❑ Self
- ❑ Spouse

Company Benefit Plan Booklets (Group Pension Plans)
- ❑ Your Employer
- ❑ Spouse's Employer

IRA Statements
- ❑ Roth
- ❑ SEP
- ❑ IRA
- ❑ IRA Rollover
- ❑ 401(k)

Most Recent Social Security Statements
- ❑ Self
- ❑ Spouse

Insurance & Annuity Contracts
- ❑ Life Insurance
- ❑ Health Insurance
  - ❑ Hospital & Major Medical
  - ❑ Disability Insurance
- ❑ Automobile Insurance
- ❑ Property and Casualty

Statements of Bank Accounts, Stocks, Bonds or Other Investments
- ❑ Self
- ❑ Spouse

Mortgage Statements
- ❑ Primary Mortgage Statement
- ❑ Second Mortgage Statement
- ❑ Home – Equity Line of Credit Statement

Wills/Trusts
- ❑ Self
- ❑ Spouse

Business Arrangements
- ❑ Buy/Sell
- ❑ Deferred Compensation
- ❑ Stock Option/Bonus Plan

________________________________ Shelley Lee Boyce, CFP®, AIF®

Signed

ITEMS RETURNED DATE ____________ SIGNED _____________________