



## Data Gathering Checklist

### Real Assets

- Real Estate

### Investment Statements

- Bank Accounts
- Taxable Brokerage Accounts
- Retirement Accounts
- Annuities
- Pensions
- Education Savings Accounts (529, Coverdell)
- Health Savings Accounts (HSAs)

### Liability Statements

- Mortgages
- Auto Loans
- Student Loans
- Credit Cards
- Private Loans

### Income & Expenses

- Paystubs
- Social Security Statements (ssa.gov/myaccount)
- Annual Living Expenses

### Insurance Statements

- Life
- Disability
- Health
- Long-Term Care
- Homeowners/Auto
- Umbrella (Liability)

### Employee Benefits Packages

- Benefits Handbooks
- Summary Plan Documents (SPD)

### Income Tax Returns (past 2 years)

- Federal Returns
- State & Local Returns

### Estate Documents

- Wills
- Powers of Attorney
- Advance Directives (Living Wills)
- Beneficiary Designations
- Trust