



Waterworth Wealth Advisors, LLC

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Suggested Documents Needed for Comprehensive Financial Planning Meeting

- _____ Tax returns for the past two years
- _____ Current liability statements (loans, mortgages, credit card balances, and debts)
- _____ Current investment account statements dated within last 90 days
- _____ Current bank statements (checking, savings, CDs)
- _____ Two recent employer payroll stubs
- _____ Employer benefit information/statements
 - Health insurance
 - Retirement plans
 - Pensions
 - Other benefits
- _____ Deferred compensation agreements - participating or eligible
- _____ Documentation of pension benefits due from your former employer
- _____ Recent Social Security statement
- _____ Copy of current wills, powers of attorney, health care proxies, and living wills
- _____ Copy of trusts (marital, ILITs, living, etc.)
- _____ Copy of prenuptial agreement
- _____ Life, health, and disability insurance policies, including annuities
- _____ Estimated value of home
- _____ Value of other real estate
- _____ Current household budget