# Wise Planning, Inc. Document List

The first step in the financial planning process is the examination of your financial resources. To that end, we request that you gather the following documents:

___ LATEST STATEMENTS FROM BANK ACCOUNTS, MONEY MARKET FUNDS, BROKERAGE ACCOUNTS, PENSION/PROFIT SHARING PLANS, IRAs, ETC.

___ PARTNERSHIP INVESTMENT DOCUMENTS

___ OTHER PERSONAL INVESTMENT DOCUMENTS

___ LAST TWO FEDERAL AND STATE TAX RETURNS

___ OTHER TAX RETURNS (GIFT, ESTATE)

___ LAST TWO PAYCHECK STUBS

___ INFORMATION ON PERSONAL DEBT (MORTGAGE DEBT AND CONSUMER DEBT)

___ INSURANCE POLICIES AND LATEST STATEMENTS FOR LIFE, DISABILITY, AND LONG TERM CARE INSURANCE

___ EMPLOYEE BENEFIT BOOKLETS

___ COPIES OF WILLS AND TRUSTS

___ PROPERTY SETTLEMENT, DIVORCE OR SEPARATION AGREEMENTS

___ BUSINESS DOCUMENTS:

INCOME TAX RETURNS
STOCK PURCHASE/BUY-SELL AGREEMENTS
EMPLOYEE BENEFIT PROGRAM DESCRIPTION
PENSION OR PROFIT SHARING PLAN DESCRIPTION