Important Financial Documents Checklist

When you meet with a financial planner, you will probably be asked to bring the following types of documents. These documents will be used to tailor a financial plan to meet your life goals. If you have questions, please contact us at (304) 760-8715 or at info@wvhfs.com.

# Retirement Planning Documents

* Recent IRA, 401(k), 403(b), TSA statements
* Employee benefits program
* Deferred comp and stock option agreements
* Pension and profit-sharing statements
* Social Security Statements from ssa.gov

# Tax Planning Documents

* Tax returns for last year
* W-2 and a recent pay stub
* Estimated taxes

# Estate Planning Documents

* Summary of your will, living will, durable powers of attorney and health care powers
* Living trusts

# Financial Documents

* Savings account statements
* Mutual fund statements
* Brokerage account statements
* Investment documents
* Loan documents
* List of stocks held outside of brokerages
* Partnership agreements

# Asset Protection Documents

* Life insurance policies and statements
* Medical, homeowners and auto insurance policies and statements
* Disability, umbrella, and long-term care insurance policies
* Annuity policies and statements