

Data Gathering Checklist



Income & Expenses

Paystubs / W2

Social Security Statements

1099s for Contractors

Monthly Budget Estimate

Most Recent Tax Return

Investment Accounts

Taxable Accounts

Equity Compensation

Health Savings Account

Education Savings – 529 Plan

Retirement Accounts

401(k), 403(b), 457

IRA, Roth, SEP, SIMPLE

Social Security Statements

Pension

Deferred Comp Plan

Real Estate

Real Estate Addresses

Liabilities

Mortgage

Auto Loan

Personal Loan

HELOC

Student Loans

Insurance Policies

Life – *Whole & Term*

Disability

Long-term Care

Homeowners

Umbrella