



## Data Gathering Checklist

*Please upload all financial documents to the Dropbox link sent to you by email.*

### **Investment Statements**

Bank Accounts  
Taxable Investment Accounts  
Traditional/Roth IRAs  
Employer Plans...  
(401k, 403b, SEP, etc. - incl. list of investment choices)  
Equity Compensation (ISOs, ESOs, RSUs, ESPPs, etc.)  
Education Savings Accounts (529, Coverdell)  
Health Savings Accounts

### **Income Tax Returns**

(previous two years)  
Federal Returns (Business & Personal)  
State & Local Returns

### **Liability Statements**

Mortgages  
Equity Lines/Loans  
Auto Loans  
Student Loans  
Credit Cards  
Other Debts

### **Employee Benefits**

Benefits Handbooks  
Current Benefits Elections Statement  
Summary Plan Descriptions

### **Income & Expenses**

Pay Statements (two most recent)  
Social Security Statements...  
(Find at [ssa.gov/myaccount](https://ssa.gov/myaccount) - PDF)  
Monthly & Annual Living Expenses

### **Real Assets**

Real Estate Addresses

### **Insurance Statements**

Annuities  
Pensions (Defined Benefit Plans)  
Life  
Disability  
Health  
Long-term Care  
Homeowners/Auto  
Umbrella (Liability)  
Professional Liability

### **Estate Documents**

Wills  
Powers of Attorney (Durable & Healthcare)  
Advanced Medical Directives (Living Wills)  
Trust Agreement  
Beneficiary Designations

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