DB TAX&WEALTH

Please gather the following information for your Financial Advising Team.

- Driver's license copies (if married, provide spouse's as well)
- Occupation(s) How long have you worked there?
- Most recent pay stub(s)
- Most recent tax returns *(2 years if we have not prepared your returns)*

- Most recent statements for the following:
  - Checking/savings accounts
  - 401(k) 403(b), 457, or other Qualified Employer Plans - include current and previous employers
  - IRAs - ROTH and Traditional
  - Annuities
  - Education accounts - 529, Coverdell, UTMA/UGMA
  - Brokerage accounts
  - Individual stocks or bonds
  - Non-publicly traded securities
  - Life insurance - term and permanent
  - Employer benefits information
  - Mortgage and/or home equity line of credit on all properties
    - Original OR the most recent refinance*:* Loan date, original loan amount, term of loan (10, 15 or 30 year) and interest rate
  - Credit card balances that are not paid *in full* each month
  - Student loans
  - Vehicle loans with original terms
  - Any other loans or liabilities

- List of assets with FMV. i.e. - Primary residence, automobiles, vacation homes, land, jewelry, collectibles, business or business property
- Directives and estate planning documents - examples: financial and/or durable power of attorney, will, or trust