

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 recentrefinance*:* 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