## Wilcox Advisors Financial Checklist

## Financial Checklist for New Clients

- 1. Gather all financial statements from the past three years
- 2. Collect tax returns for the past three years
- 3. List all current assets and liabilities
- 4. Document all sources of income
- 5. Prepare budget and expense reports
- 6. Organize business licenses and permits
- 7. Collect insurance policies and coverage documents