

Evergreen Financial Planning

Documentation Checklist

Client Name _____

Date ____ / ____ / ____

- Cash Flow Worksheet
- Credit Card Statement(s)
- Credit Card Report(s)
- Social Security Benefit Report(s)
- Pension Benefits Information
- Bank Statement(s)
- Brokerage Account Statement(s)
- Mutual Fund Account Statement(s)
- Retirement Plan Account Statement(s)
- Retirement Account Investment Option(s)
- Paycheck Stub(s) (with cumulative year to date information)
- Employee Benefits Booklet(s) *q Specifically*
- Tax Returns for last ____ years
- Insurance Policies ____ Homeowners ____ Life ____ Auto ____ Disability ____ LTC ____ Umbrella
- Declarations Pages ____ Homeowners ____ Life ____ Auto ____ Disability ____ LTC ____ Umbrella
- Loan Documents ____ Home ____ Auto ____ Other
- Trust Documents ____ Client 1 ____ Client 2
- Wills ____ Client 1 ____ Client 2
- Risk Tolerance Questionnaire
- Other Questionnaire(s)
- Service Agreement
- Other _____
- Other _____
- Other _____

Return data by: ____ / ____ / ____

Next Appointment: ____ / ____ / ____ Time: _____

Location: ____ Office ____ Teleconference ____ Other: _____