Everett Wealth Solutions, Inc.
A Registered Investment Advisor

DOCUMENT CHECKLIST

PLEASE READ:
All documents/information are kept confidential. You may email or fax these documents. **If emailing, use the ## email security protocol by placing ## and a space before your subject line: ## Data. Please remove social security numbers/account numbers for your own security.** While we take every precaution to safeguard your confidentiality once we receive your data, we will not be responsible if your personal data is captured via e-mail transmission.

Tax Information

☐ Most current tax return including W2's
- ask about our free CPA tax return review [up to 3 years]

☐ Other records of income earned including trust tax returns
☐ Business tax returns

Insurance Information

☐ Social Security report showing benefits
- for most current data, go to www.SSA.gov

☐ Auto/Home/Umbrella declaration pages
- ask about analysis for best coverage and rates

☐ Life insurance policies/statements – all family members
- cash and death values, premiums, beneficiaries

☐ Disability policies/coverage
☐ Long Term Care policies/coverage

Current Saving and Investments (statements)

☐ Checking and savings
☐ CD's
☐ Money Market Accounts
☐ Brokerage Accounts
☐ Stocks/Bonds/Mutual Funds
☐ Trust Accounts
☐ Annuities

Individual Retirement Account (statements)

IRA, ROTH IRA

Legal Information

☐ Wills
☐ Trusts
☐ Divorce Agreement
☐ Power of Attorney documents

Employee Benefit Information

☐ Current paycheck stub(s)
☐ Group Health Benefit(s)
☐ Group Life Benefit(s) with beneficiary information
☐ Group Disability Benefit(s)
☐ 401k, 403b, 457, TSP Qualified Plan Statement(s)
☐ Pension information/projections

Business Owner Information

☐ P&L; Balance Sheet, Business Asset Value
☐ Number of Employees

Mortgage and/or Home Equity Information

☐ Current mortgage statements showing balance due, interest rate, principal, interest, escrow payments and extra principal payments

Other Debt Information (balance due, interest rate, terms)

☐ Auto
☐ Credit Cards
☐ Other Loans

Everett Wealth Solutions, Inc. [EWS] is a registered investment advisor. EWS provides fiduciary financial planning and asset management services.
407 Marengo Avenue – Forest Park – IL 60130 Tel: (708)771-7777 Fax: (708) 771-7786
www.EverettWealthSolutions.com