DOCUMENTS TO GATHER FOR YOUR INSIGHT MEETING

TAXES

- [ ] Most Recent Tax Return
- [ ] W2, 1099, or Other Income
- [ ] Recent Paystub
- [ ] Charitable Donations

ESTATE PLANNING

- [ ] Wills
- [ ] Power of Attorney – Financial
- [ ] Power of Attorney – Healthcare
- [ ] Trust Documents

DEBTS

- [ ] Home Mortgage
- [ ] Credit Card
- [ ] Student Loans
- [ ] Auto Loans

INSURANCE

- [ ] Life Insurance
- [ ] Disability Insurance
- [ ] Long Term Care Insurance

ASSETS

- [ ] Checking and Savings Accounts
- [ ] Bank CD's
- [ ] Money Markets
- [ ] EE Savings Bonds
- [ ] Brokerage Accounts
- [ ] Retirement Accounts (401k/IRA)
- [ ] Annuities
- [ ] Mutual Fund Accounts