

LIST OF ITEMS TO BRING TO YOUR NEXT APPOINTMENT

1. Original or certified copy of civil marriage certificate. (Church marriage certificates will not be accepted)
2. Copies of recent paycheck stubs, dating back one month, and those of your spouse, if available.
3. Copies of business ledgers and books showing gross receipts and expenses if you own your own business.
4. If previously divorced, copies of any and all court orders, judgments, and separation agreements.
5. Copies of any deeds from any property that you own solely or jointly with another.
6. Copies of you and your spouses' most recent W2 Forms.
7. Copies of your latest credit card statements.
8. Copies of most recent statements for IRA accounts, Money Market accounts, Checking accounts, Savings accounts, 401-K, pension plan, brokerage accounts and/or Keogh account statements held solely or jointly with another.
9. Most recent statements, documents and descriptive booklet of any employees' benefits, including pension, retirement, profit-sharing plans and insurance policies.
10. Most recent statements and/or documents relative to assets, bank accounts, brokerage accounts in child(ren)s name(s) or in names of others.
11. Copies of wills, trusts and any documents pertaining to inheritances received or about to be received.
12. Copies of your federal and state income tax returns for the last three years.
13. Copies of documents showing the fair market value of vehicle(s). (edmunds.com, www.kbb.com, N.A.D.A values) along with copies of auto loan statements including payoff statements.
14. Copies of latest utility bills, auto insurance bills, property tax statements and homeowners insurance bills.
15. Copy of mortgage payoff amount.
16. Copies of closing statements and HUD statements relative to real estate transactions.
17. Copies of any recent appraisals performed on any real estate or business you have an interest in.
18. Completed client information sheet.