**Please check box as you gather each document:**

* Personal income tax returns
* Paycheck stub(s) for you and your spouse showing deductions from gross income
* Wills and Trust documents
* All Personal Insurance Policies
  + Automobile Policies

(Include Declarations of coverage)

* Homeowner’s or Renter’s Policy (Include Declarations of coverage)
* Disability Income Policies
* Hospitalization and Major Medical Policies
* Umbrella policies
* Life Insurance Polices (For all members of your family) -Annual Statements –Loan Statements
* Any other types of Insurance Policies
* Copy of Drivers license
* Most recent Government Plan Statements – For example Social security. If you have not done so already, go to [www.ssa.gov](http://www.ssa.gov) and set up your account. You will no longer get statements from SSA in the mail
* Most recent Mortgage Statements
* Information on any / all Debt
* Employer-provided group benefits for you and your spouse (Please include a printout of specific coverage’s if available)
* Current account statements (for savings, retirement, investments, etc.)

**For Business Owners Only:**

* Business Life Insurance Policies
* Business income tax returns
* Business financial statements
* Buy- Sell Agreements
* Business Agreements (i.e. key person, deferred compensation, etc.)