

KOBEL

FINANCIAL PLANNING

Personal Documents	
Name _____	Date _____
	RECEIVED
Individual Income Tax returns for the last 3 years	
Previous Gift Tax Returns	
Wills & Trust Agreement	
Powers of Attorney & Health Care Proxies	
Pre-Marital Agreement	
Divorce Settlement	
Copies of statements for mutual funds, securities, bonds, bank, 401(K), profit sharing, pension, thrift plan, ESOP, TSA	
Copies of Pay Stubs	
Life Insurance Policies and annual statements	
Current Casualty Insurance Policies (home, auto, boat, special liability coverage)	
Appraisals of personal property, jewelry, collections, antiques, etc.	
Most recent employee benefit statements & booklets	
Copy of beneficiary designation for Employee Benefits	
Employment Agreement	
List of assets for minors	
Deferred Compensation/Stock Option Agreements and statements	
Limited Partnership Agreements	
Lease Agreements	
Descriptions of real estate and related mortgages	
Installment Sale Contracts	
Other	

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