

APPLICABLE

OBTAINED

MISCELLANEOUS

Information on present or anticipated inheritances

Completed Budget/Spending Plan worksheet (Ours)

BUSINESS OWNERS

Copies of corporate returns, federal & state

Copies of partnership agreements or articles of incorporation

Copies of latest business financial statements

Copies of buy and sell, stock redemption, split dollar and other agreements

Value of business and stock or ownership

Qualified retirement deferred compensation plan(s), documents & statements

Business insurance coverage