PFM
PALADINI
Financial Management

Information Request Checklist

Please submit *copies* of the following items with your completed client questionnaire and any other pertinent financial information.

Personal Information

1. Insurance coverage (declaration and premium pages only).
    a. Auto, homeowners and personal umbrella policies
    b. Disability and life insurance policies
    c. Long term care
2. Investment account information (ie 401(k), brokerage statements, etc)
3. College education savings accounts
4. Bank account statements (checking, savings, money market, etc)
5. Wills and estate planning
6. Divorce decrees or separation agreements, if applicable
7. Loan documents (mortgages, auto notes, credit cards, other)
8. Pay-stubs
    a. Most recent year to date stub
    b. Prior year's December 31 stub.
9. Personal income tax returns (federal and state returns for prior two years)
10. Prior financial planning transcripts (3 years)