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Document Checklist

PIONEER
WEALTH MANAGEMENT GROUP

For the preparation of your wealth plan please provide all the necessary documents to your financial planner.

☐ Personal Assets & Investments

- ☐ Bank Statements (savings, checking, money market, certificate of deposit(s))
- ☐ Investment Records (brokerage/annuities)
- ☐ Stock Options/Purchase Plan Agreements
- ☐ Alternative Investments (e.g.- crypto, rental property, royalties, LP's, REIT, private equity)
- ☐ Other Personal Assets & Investments: ____________

☐ Retirement Statements

- ☐ Company Pension Plan Statements
- ☐ 401(k)/403(b) Plan Statements
- ☐ SEPs/SIMPLE/Keogh Statements
- ☐ IRA/Roth IRA Statements
- ☐ Social Security Earnings & Benefits Statements
- ☐ Employer Provided Benefits Summary Plan

☐ Insurance & Coverage Statements

- ☐ Life Insurance Policies
- ☐ Long-Term/Short-Term Disability Policies
- ☐ Long-Term Care Policies
- ☐ Home/Renter's Coverage
- ☐ Other Policies (e.g.- auto, umbrella, rental property)

☐ Liability Statements

- ☐ Installment Accounts (e.g.- mortgage, home equity loan, personal, auto, student)
- ☐ Revolving Accounts (e.g.- credit cards, retail, line of credit)

☐ Estate Planning Documents

- ☐ Last Will & Testament
- ☐ Medical Power of Attorney
- ☐ Advance Medical Directive(s)
- ☐ HIPAA Authorization
- ☐ Living Trusts or other trust documents

☐ Tax Forms

- ☐ Business Tax Returns (past 3yrs)
- ☐ Personal Tax Returns (past 3yrs)
- ☐ W-2 Forms
- ☐ Recent Pay Stubs (from previous 2 months)

☐ Education & Minor Statements

- ☐ 529 Savings Plan or other education statements
- ☐ Other assets owned by dependent children
- ☐ Custodial/Dependent Accounts

☐ Other Documents [Maximum 150 characters]

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☐ Notes [Maximum 250 characters]

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Clear Form