

Data Gathering Checklist

Upload as many documents as possible to the eMoney vault

• Investment Statements

- Bank Accounts (Saving/Checking)
- Taxable Brokerage Accounts
- Retirement Accounts
- Annuities
- Pensions
- Education Savings Accounts
- Health Savings Accounts

• Income & Expenses

- Pay Statements
- Social Security Statement (ssa.gov/myaccount)
- Annual Living Expenses (if known)

• Liability Statements

- Mortgages
- Auto Loans
- Student Loans
- Credit Cards (if carrying balances)
- Private Loans

• Insurance Statements

- Life
- Disability
- Health
- Long-Term Care
- Homeowners/Windstorm
- Auto
- Umbrella

• Employee Benefits

- Benefits Handbooks (if not Dow)
- Summary Plan Descriptions (if not Dow)
- Current Benefit Elections

• Income Tax Return (1-2 years)

- Federal Returns
- State/Local Returns

• Estate Documents

- Wills
- Powers of Attorney
- Advance Directives
- Trusts