

Request for Documents

In order for me to outline what your financial plan and the financial planning process will address, as well as the associated fee, please complete the enclosed data gathering form to the best of your ability and deliver it to our office.

- _____ Auto, homeowners and other liability insurance declaration pages
- _____ Life insurance, disability, long term care policies and any recent statements
- _____ Annuity contracts and most recent statement
- _____ Most recent Federal and State Tax Returns
- _____ Signed copies of your current estate planning documents - will, power of attorney, living trust, health care directive, etc.
- _____ Most recent investment statements (banks, stocks, bonds, mutual funds, IRA, 401k, 403b, etc.)
- _____ Cost Basis information for investment holdings
- _____ Description of beneficiary designations on life policies (including employer), annuities, IRA, 401(k), 403(b), etc.
- _____ List of expenses representative of the past 12 months
- _____ List of income sources and income since last year. Include copies of W2s, final paystubs from year end and most recent paystubs.
- _____ Most recent social security benefit statements
- _____ Investment options and performance for employer sponsored plans
- _____ Loan documents, credit card statements and amortization schedules
- _____ Employee benefit books
- _____ If self employed, copy of business succession plan and Articles of Incorporation
- _____ Notes receivable with amortization schedules
- _____ Current real estate tax bill

THE UNIVERSITY OF CHICAGO

THE UNIVERSITY OF CHICAGO LIBRARY

100 EAST SOUTH EAST STREET

CHICAGO, ILLINOIS 60607

TEL: 773-936-3000

WWW.CHICAGO.LIBRARY.EDU

CHICAGO LIBRARY

CHICAGO LIBRARY

CHICAGO LIBRARY

CHICAGO LIBRARY

CHICAGO LIBRARY

CHICAGO LIBRARY

CHICAGO LIBRARY

CHICAGO LIBRARY

CHICAGO LIBRARY

CHICAGO LIBRARY

CHICAGO LIBRARY

CHICAGO LIBRARY