INTEGRAS PARTNERS

To best understand your situation, we request access to these documents, which allows us to spend our time together discussing your values and goals. We accept printouts, flash drives or originals. We're happy to make copies while you're here.

- ❑ Federal and State Income Tax Returns for the past two years, personal and corporate
- ❑ Two most recent pay stubs or Quarterly Payroll Tax Returns, plus bonus/grants details
- ❑ Current statements on all bank, mutual fund, brokerage, college savings accounts and 401(k)s with list of available 401(k) investment choices
- ❑ Recent statements for all outstanding loans including mortgages, cars or consumer debt (Make notes of original loan date and amount, interest rates and payment)
- ❑ Legal Documents including Wills, Powers of Attorney, Healthcare Directives and Trust agreements
- ❑ Expense – Actual expenses or estimated monthly, quarterly and annual expenses
- ❑ Life Insurance and Annuity contracts; including Information regarding corporate or group policies (health, life or disability – including the definition of disability per the contract)
- ❑ Recent social security benefit estimate from their website www.ssa.gov
- ❑ Driver's Licenses – We will make copies while you're here

❑ Optional Information that You May Wish for Us to Include:

- ❑ Declaration page for Property & Casualty insurance policies, including: auto, home, life, disability, personal umbrella / liability policies
- ❑ QuickBooks or Quicken information
- ❑ Information on anticipated inheritances or business distributions
- ❑ Employee benefits, including Insurance, Employee Stock Purchase Plans, FlexAccounts, etc.