

# *RPG Advantage™*

## *Document Checklist*

*In order to prepare a financial plan, we will need the following documents for review and analysis:*

### **PERSONAL DOCUMENTS**

- Will - Husband
- Will - Wife
- Trust Documents (as Grantor or Beneficiary)
- Personal Financial Statement
- Monthly or Quarterly Investment Reports or Statements
- Life Insurance Policies & current statement of values, if available
- Disability Insurance Policies & current statement, if available
- Long Term Care Insurance Policies
- Form 1040 Income Tax Returns (2 years), including Form K-1
- Form 709 Gift Tax Return
- Current Pay Stub
- Property or Investment Agreements
- Property Settlement Agreements
- Pre / Post Nuptial Agreements
- Retirement Plan Statement / Investment List
- Debt Schedules (initial balance, interest and term of the debt)
- Living Expenses (not including taxes, debt payments or non-recurring expenses)
- Other \_\_\_\_\_

### **BUSINESS DOCUMENTS**

- Balance Sheets
- Profit and Loss Statement
- Group Benefits Booklet
- Retirement Plan Booklet / Document
- Employee Census
- Schedule of Additional Employee Benefits
- Deferred Compensation Agreements
- Employment Agreements
- Business Continuation Agreements (Buy/Sell)
- Corporate Minutes
- Form 1120 Corporate Income Tax Returns (2 years)
- Other Entity Income Tax Returns (2 years)
- Business Life Insurance Policies, with Most Current Statement
- Business Disability Insurance Policies with Most Current Statement
- Any Business Valuation Appraisals
- Other \_\_\_\_\_

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