STENGER FAMILY OFFICE
DOCUMENT PLANNING CHECKLIST

Below is a list of documents that can help in the creation of your financial plan.

Assets & Investments

- ☐ Bank statements: saving & checking
- ☐ Investment statements
- ☐ Retirement accounts (IRAs, 401(k), 403(b))
- ☐ Lump sum pension plan information
- ☐ Business ownership information

Liabilities

- ☐ Mortgage statements
- ☐ Home equity loans
- ☐ Student loans
- ☐ Other loan information

Income

- ☐ W-2
- ☐ Social Security benefit estimates
- ☐ Pension plan information
- ☐ Most recent tax return

Estate Planning

- ☐ Wills & trust documents
- ☐ Powers of attorney
- ☐ Health care proxies

Insurance

- ☐ Whole life policies
- ☐ Term life policies
- ☐ Annuity statements
- ☐ Long term care insurance

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