Start-up Client Checklist: Statements and Information Useful to OTWP for proper planning

Legal Documents
- Wills
- Trusts
- Power of Attorney (Health Care, Financial)

Most Recent Investment Statements
- Retirement plans (401k, profit sharing, IRAs)
- Banks
- Investment companies
- Trust companies
- Brokers

Insurance Statements
- Life
- Disability
- Auto/Home
- Liability
- Umbrella Policy
- LTC

Mortgage and loan statements
- Mortgage payment statement
- All loan detail statements

Pension and Social Security Statements
Stock option agreements and statements
Tax returns from prior year
Salary withholding and employee benefit information
Monthly living expenses top line summary
All other statements or documentation

Please also consider documenting significant future purchases or expenses. Thank you in advance for taking the time and effort to collect all the aforementioned data. We look forward to working with you!