Greater Gifts
Family Office

Macke Financial Advisory Group
Wealth Management & Life Planning

Request for Planning Documents

In order for us to outline what your financial plan and the financial planning process will address, we request copies of the following documents. These may be uploaded to the Shared Documents folder in your Vault or emailed to us directly.

***The checklist is meant to be a starting point in the planning process. Please don't feel overwhelmed by this first step. Our team is happy to help guide you along the way!**

_____ Most recent Federal and State Tax Returns

_____ Most recent Social Security benefit statement

_____ Signed copies of your current estate planning documents - will, power of attorney, living trust, health care directive, etc.

_____ 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

_____ List of income sources and income since last year. Include copies of W2s, final paystubs from year end and most recent paystubs.

_____ Estimation of expenses representative of the past 12 months

_____ 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 insurance and/or investment accounts

_____ Investment options and performance for employer sponsored plans

_____ Mortgage/Loan documents, credit card statements and amortization schedules

_____ Employee benefit books

_____ If self-employed, copy of business succession plan and Articles of Incorporation

_____ Current real estate tax bill