

Document checklist

In order to prepare a comprehensive financial strategy, we will need the following documents for review and analysis.

Personal Documents

- □ AHFG Info Questionnaire completed
- □ AHFG Budget completed
- Wills- Each Partner
- Trust Document(s)
- □ Asset Protection Plan(s)
- □ Life Insurance Policy(ies)
- Disability Insurance Policy(ies)
- □ Long Term Care Insurance Policy(ies)
- □ All Investment Statement(s)
- All Retirement Statement(s)
- Social Security Statement(s)
- □ Income Tax Returns 2 years including k-1
- Other_____

Notes: _____

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