

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: _____

