

Motifplanning

Document checklist

Bank statements

- Checking accounts
- Savings accounts
- Business accounts
- CDs (Certificate of deposits)

Investment statements

- Taxable brokerage accounts
- Retirement accounts
- HSAs (health savings accounts)
- 529 Plans (education savings accounts)
- Stock options
- Alternative investments
 - Private, crypto, foreign
- Annuities
- Pensions

Asset & liability statements

- Titles to personal property
 - Home, auto, jewelry, instruments, etc.
- Mortgages
- Auto loans
- Student loans
- Private loans
- Credit cards
- Credit report
 - annualcreditreport.com

Tax (past 2 years)

- Federal returns
- State & local returns
- 1099s & W2 forms

Income & expenses

- Paystubs
- Royalty statements
- Record deal contracts
- Music business agreements
 - Manager, attorney, etc.
- Employee benefits handbooks
- Summary plan documents (SPD)
- Social Security statements
 - ssa.gov/myaccount
- Annual living expenses

Insurance

- Life
- Disability
- Health
 - Medical, dental, vision
- Long-term care
- Homeowners/Renters
- Auto
- Umbrella (liability)
- Business liability

Estate Documents

- Wills
- Powers of attorney
 - Medical, durable
- Health directives (living will)
- Beneficiary designations
- Funeral instructions
- Trusts
- Prenuptial agreements