

- Most Recent Income Tax Return
- Most Recent Personal Financial Statements
- Most Recent Investment Account Statements
- Paycheck Stub(s) Showing Deductions From Gross Income
- Company-Provided Group Benefits Booklets/Statements
- Pension and 401(k) Reports (Including Plan Documents)
- Wills and Trust Documents
- Insurance Policies (Including Declarations of Coverage)
  - Disability Policies
  - Life Insurance Policies
- Most Recent Annual Report or Policy Statements
- Loan Statement
- Dividend Statements