Documents Needed For Holistic Wealth Planning

Please upload all applicable documents to your personal online vault

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LESTNA RETIREMENT

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Employer Documents

- ☐ Employee benefits statement or brochure
- ☐ Group health and dental insurance
- ☐ Group/Individual Disability insurance
- ☐ Group Life Insurance
- ☐ Pension and Profit-Sharing retirement plan documents
- ☐ Stock Option programs (Employee Stock Purchase Plan, Non-Qualified Stock Options, Incentive Stock Options, Restricted Stock Units, etc.)
- ☐ Deferred Compensation programs (NQDC)

Financial Documents

- ☐ Two most recent pay stubs
- ☐ Most recent statements reflecting current investments in retirement and non-retirement accounts
- ☐ Most recent bank accounts statements
- ☐ Social Security statement
- ☐ Most recent credit card statement(s)
- ☐ Credit report. If no, a report from Credit Karma or similar service
- ☐ Personal budget

Debt Related Documents

- ☐ Auto loan
- ☐ Home loan
- ☐ Home equity line of credit documents
- ☐ Most recent mortgage statement(s)

Insurance and Annuity Contacts

- ☐ Auto insurance
- ☐ Home insurance
- ☐ Life insurance
- ☐ Disability insurance
- ☐ Long-Term Care insurance
- ☐ Umbrella insurance
- ☐ Professional liability insurance
- ☐ Annuity policy documents and statements
- ☐ All other insurance policies under your name

Real Estate

☐ Real Estate Deeds (including out-of-state property)

Tax Planning Documents

☐ Most recent Income Tax Return, including 1099s and K-1s)
☐ Real Estate tax statement

Estate Planning Documents

☐ Wills and codicils
☐ Trust documents
☐ Durable power of attorney
☐ Letter of intent
☐ Healthcare power of attorney
☐ Guardianship designations

Other Documents

☐ Any other material financial documents such as business arrangements
☐ Cash-flow worksheet