



**MEASURE TWICE**  
— PLANNERS —

# DATA GATHERING CHECKLIST

## Real Assets

- Real Estate Addresses

## Investment Statements

- Bank Accounts
- Taxable Brokerage Accounts
- Retirement Accounts
- Annuities
- Pensions
- Education Savings Accounts (529, Coverdell)
- Health Savings Accounts (HSAs)

## Liability Statements

- Mortgages
- Auto Loans
- Student Loans
- Credit Cards
- Private Loans

## Income & Expenses

- Pay Statements
- Social Security Statements ([ssa.gov/myaccount](https://ssa.gov/myaccount))
- Annual Living Expenses

## Insurance Statements

- Life
- Disability
- Health
- Long-Term Care
- Homeowners/Auto
- Umbrella (Liability)

## Employee Benefits Packages

- Benefits Handbooks
- Summary Plan Descriptions (SPDs)

## Income Tax Returns (past 2 years)

- Federal Returns
- State & Local Returns

## Estate Documents

- Wills
- Powers of Attorney
- Advance Directives (Living Wills)
- Beneficiary Designations
- Trusts