

DOCUMENTS AND ATTACHMENTS TO ACCOMPANY CONFIDENTIAL CLIENT HISTORY

1. Original or certified copy of civil marriage certificate.
2. A copy of most recent one-month's paycheck stubs, and those of spouse's if available.
3. If previously divorced, copies of any court orders, judgments and separation agreements.
4. Copies of any deeds, and a recent bank statement showing unpaid amounts or mortgages remaining on real estate.
5. Last balance sheet and profit & loss statement, tax return, buy-sell agreements, etc., from any business interests.
6. Last statement and descriptive booklet of any employee's benefits, including pension, retirement, profit-sharing plans and insurance policies.
7. A description of children's guardianships, trusts and estates, assets held under Uniform Gifts to Minors Act, etc.
8. A copy of your own and your spouse's wills, and of any trust either of you has created or in which either has an interest.
9. Copies of your, and your spouse's if filing separately, most recent federal and state income tax returns.