KMI

Documents Needed

The following documents will be needed to properly study, analyze, and prepare a personal financial/investment plan for you. This material will be treated confidentially and returned when the planning process is completed, or copies can be made and can be returned earlier if requested.

From your	
Personal Files	☐ Latest income tax returns ☐ Loan documents ☐ Wills ☐ Trust Agreements ☐ Major asset purchase details ☐ Other
Employer	☐ Payroll or other income statements ☐ Employer Benefits booklet ☐ Retirement savings plan ☐ Pension plans ☐ Other
Bank or Credit Union	☐ Checking Account statements ☐ Savings/CDs/Money Market account statements ☐ Credit Card statements ☐ Other
Broker or Mutual Fund Company	☐ Latest Monthly statement ☐ Other
Insurance Company	☐ Latest life insurance/annuity account statement ☐ Health insurance/hospital & major medical policy information ☐ Disability income insurance policy information ☐ Property & Casualty policy information ☐ Auto insurance Policy information ☐ Long-Term Care policy information ☐ Other
Business	☐ Buy-Sell Agreements ☐ Deferred Compensation Agreements ☐ Stock/Option/Bonus Plans & Vesting Schedule if applicable ☐ Other

Additional Comments ____

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