BLUE CHIP PARTNERS, INC.

a Registered Investment Advisory Firm

DELEGATE CONFIDENTLY™

Document Checklist

To enable us to provide the best possible financial planning service, please bring copies of the following financial documents.

Retirement Planning Documents

- ❒ Recent IRA, 401(k), 403(b), TSA, Keogh statements
- ❒ Employee benefits program
- ❒ Deferred compensation and stock option agreements
- ❒ Pension and profit sharing statements
- ❒ Social Security benefits estimate

Tax Planning Documents

- ❒ Tax returns for last year
- ❒ W-2 and a recent pay stub
- ❒ Estimated taxes

Financial Documents

- ❒ Savings account statements
- ❒ Mutual fund statements
- ❒ Brokerage account statements
- ❒ Education savings statements
- ❒ Investment documents
- ❒ List of stocks held outside of brokerages
- ❒ Mortgage statements

Asset Protection Documents

- ❒ Life insurance policies and statements
- ❒ Medical, homeowners and auto insurance policies and statements
- ❒ Disability, umbrella, and long term care insurance policies
- ❒ Annuity policies and statements

Estate Planning Documents

- ❒ Will, living will, durable powers of attorney and health care powers
- ❒ Living trusts

Other Documents

- ❒

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