

Wisdom Investments, Inc.

Documents Required

- _____ 1. Copies of existing wills.
- _____ 2. Copies of any trust agreements in effect.
- _____ 3. Copies of federal income tax return are for the last three years.
- _____ 4. Annual reports, tax returns, and other agreements regarding ownership in closely held corporations, partnerships, joint ventures, or other businesses.
- _____ 5. Life insurance policy annual reports, periodic billing and summary of policies owned.
- _____ 6. Automobile, homeowner and umbrella policies.
- _____ 7. Copies of divorce settlements, separation agreements, etc.
- _____ 8. Federal estate tax returns, if you or your spouse has been the beneficiary of any estates.
- _____ 9. Federal gift tax returns.
- _____ 10. Most recent report of vested interest in pension and/or profit sharing plans, including IRA's.
- _____ 11. Outline or other information regarding other corporate benefits such as hospitalization, disability insurance, etc.
- _____ 12. Listing of assets with an estimate as to fair market values, as well as a listing of liabilities.
- _____ 13. Estimate of monthly/annual budget information.
- _____ 14. Copy of latest mortgage statement.
- _____ 15. Copies of latest brokerage statements.
- _____ 16. Other:
