VICTORY
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DOCUMENTS NEEDED

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

Personal Files

- ☐ Financial Road Map®
- ☐ Latest income tax returns
- ☐ Loan documents
- ☐ Warranty Deeds, etc.
- ☐ Wills
- ☐ Trust agreements
- ☐ Major assets purchase details
- ☐ Other ______________________

Employer

- ☐ Payroll or other income statement
- ☐ Employee benefits booklet
- ☐ Retirement savings plans
- ☐ 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 statements
- ☐ Other ______________________

Insurance Company

- ☐ Latest life insurance annuity account statements
- ☐ Health insurance/hospital & major medical policy information
- ☐ Disability income insurance policy information
- ☐ Property & Casualty policy information
- ☐ Other ______________________

Business

- ☐ Buy-Sell Agreements
- ☐ Deferred Compensation Agreements
- ☐ Stock/Option/Bonus Plans
- ☐ Other ______________________

ADDITIONAL COMMENTS:

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