

THE FOLLOWING DOCUMENTS
MUST BE PRODUCED TO OUR OFFICE

REQUIRED DISCLOSURES
Due Date: _____

INSURANCE POLICIES - LIFE, DEATH, HEALTH, HOME, AUTO, PERSONAL ARTICLES, UMBRELLA, RENTER'S, LIABILITY, DENTAL, VISION						
Insurance Company Name/Type of Coverage/Last four digits of Policy No.	Produce Declaration Page	Produce 3 months of premium invoices	Which spouse pays?	Monthly Premium	If Health or Dental Ins., Produce Policy	If Health or Dental Ins., Produce Benefits Summary
FEDERAL TAX RETURNS	2022	2021				
Produce two years of returns (if you do not have possession of the return, log into www.irs.gov and request a copy of the transcript AND the return)						
Produce W-2s, 1099s, and/or Schedule K-1						
PAYROLL INFORMATION			Paystub 1	Paystub 2		
Produce complete copies of your two most recent payroll check stubs (log into your employee account, request from your human resources department, request from company office manager/bookkeeper)						

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LIST OF ELECTRONICALLY STORED INFORMATION	Name of Item (i.e. bank statements, photos, emails, texts, social media, etc.)	How stored: PC, flash drive, online storage, provider, etc.	Name of person(s) with access to stored info.			
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