



**BBK** WEALTH  
MANAGEMENT

PERSPECTIVE. GUIDANCE. PROTECTION.

## DATA GATHERING CHECKLIST

### **REAL ASSETS**

Real Estate Addresses  
Collectible Assets

### **INSURANCE**

Life, disability, umbrella  
Health  
Long Term Care  
Homeowner's & Auto

### **LIABILITIES**

Mortgages  
Auto Loans  
Student Loans  
Credit Cards  
Private Loans

### **EMPLOYEE BENEFITS**

Benefit Handbook  
Summary Plan Documents

### **INVESTMENTS**

Bank Accounts  
Brokerage Statements  
Annuities  
Pensions  
Educational Accounts  
Health Savings Accounts

### **INCOME & EXPENSES**

Paystubs  
Social Security Statements  
TAX RETURN - PAST 2 YEARS  
Annual Living Expenses

### **LEGACY DOCUMENTS**

Wills  
Trusts  
Advanced Directives  
Power of Attorney  
Beneficiary Designations

**MORE THAN FINANCIAL PLANNING**

[bbkwealth.com](http://bbkwealth.com)