

Provencher Financial Services

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Visit us on the Web @ www.provencherfinancialservices.com

Financial Planning Documents

In completing a personal financial program, the following documents will provide the type of information needed:

- _____ Tax returns for the last year. (two years, only if significant differences)
- _____ Your last statement of earnings, with deductions for each wage earner and/or income from Social Security, Pensions & Investments.
- _____ Employee benefit booklet(s) which detail pension plans and last statement with pension plan status. (if still employed)
- _____ Last Social Security Statement for you & spouse. (green statement issued yearly)
- _____ Your last statement from your or spouse's IRA, 401-k's, 403-b's or pension plan.
- _____ Life insurance policies, disability or long term care insurance policies (family).
- _____ Balances of savings accounts, CD's with maturity dates & Savings Bonds.
- _____ Approximate value of your home, investment properties; vacation homes, your household furnishings, autos and other personal property (i.e. jewelry, coins, etc.).
- _____ Homeowners, Auto & Umbrella Insurance Policies.
(including any vacation home, rental property or jointly owned property).
- _____ The current statements with the values of any stocks, bonds, mutual funds or fixed and variable annuities which you own.
- _____ The value of any businesses which you either fully or partially own.
- _____ Outstanding debt obligations such as :
 - Home Mortgages _____ Credit card debts _____
 - Bank loans _____ Education loans _____
 - Home equity loans _____ Other _____

Questions??? Please feel free to call us at (413) 596-0000 or toll free (877) 596-5500

The above checked documents were received from _____ and will be promptly returned.

Signature

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**Securities, Financial Planning and Investment Advisory Services offered through
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