

The — Von Dohlen Knuffke — Financial Group

Navigating Smart Financial Choices for Texas Physicians to Achieve Purpose in Life

Documents Required

(for Financial Road Map meeting)

Name: _____

Date: _____

The following documents will be needed to complete your financial road map. This material will be kept confidential.

From your

Personal Files	<input type="checkbox"/> Income Tax Returns	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Loan Documents	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Wills	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Trust Agreements	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Estate Planning / Other Legal Documents	Rec. <input type="checkbox"/>
Employer	<input type="checkbox"/> Payroll or Other Income Statements	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Employee Benefits Booklets	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Retirement Savings Plans	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Pensions Plans	Rec. <input type="checkbox"/>
Bank or Credit Union	<input type="checkbox"/> Checking Account Statements	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Saving / CD / Money Market Account Statements	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Bank Term Notes / Lines of Credit Agreements / Statements	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Credit Card Statements	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Mortgage Documents / Terms / Statements	Rec. <input type="checkbox"/>
Brokerage or Mutual Fund Company	<input type="checkbox"/> Brokerage Statements	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Health Savings Account Statements	Rec. <input type="checkbox"/>
Insurance Company	<input type="checkbox"/> Life Insurance / Annuity Account Statements	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Health Insurance Policy Information	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Disability Income Insurance Policy Information	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Long-Term Care Policy Information	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Property & Casualty Policy Information	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Professional Liability / Malpractice Insurance Policy Information	Rec. <input type="checkbox"/>
Business	<input type="checkbox"/> Business Tax Returns	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Buy-Sell Agreements	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Employment / Compensation Agreements	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Salary Guarantee / Options / Bonus Plans	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Profit & Loss / Income Statement	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Balance Sheet	Rec. <input type="checkbox"/>
	<input type="checkbox"/> Real Estate / Oil / Gas Leases	Rec. <input type="checkbox"/>

Additional Comments: _____

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Investment advisory services offered through The Von Dohlen Knuffke Financial Group, LLC, a state registered investment adviser.

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