BULLOGIC
Wealth Management

Planning Document Request Checklist

Please connect your accounts through the eMoney platform, upload your documents through the vault link, or bring them into our meeting.

Banking
- ☐ Checking accounts
- ☐ Savings accounts
- ☐ CD information
- ☐ Savings bonds

Insurance
- ☐ Life insurance policies
- ☐ Auto policies
- ☐ Renters/Homeowner policy
- ☐ Annuity information
- ☐ Other insurance policies

Investments
- ☐ Brokerage statements
- ☐ IRA statements
- ☐ 401k statements and investment options
- ☐ Other retirement account information

Taxes
- ☐ Most recent tax return

Loans & Credit Cards
- ☐ Mortgage statement
- ☐ Student loan statements
- ☐ Credit card statements
- ☐ Vehicle loan statements
- ☐ Other loans and debts

Estate Planning
- ☐ Beneficiary information
- ☐ Will
- ☐ Trust documents
- ☐ Power of attorney
- ☐ Healthcare proxies

Employment
- ☐ Last two paystubs
- ☐ Benefits brochures

Other
- ☐ Social Security statement*
- ☐ Driver's license

*Go to SSA.gov/myaccount to retrieve your Social Security statement

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