

Your Online Access Document Checklist

	GFC Provided	Client Provided
Financial Plans	<input checked="" type="checkbox"/> Initial Plan <input checked="" type="checkbox"/> Annual Updates	<input type="checkbox"/> Source Documents
Portfolio Statements	<input checked="" type="checkbox"/> GFC Statements	
Taxes	<input checked="" type="checkbox"/> Tax Returns <input checked="" type="checkbox"/> Estimated Payment Vouchers	<input type="checkbox"/> Source Documents
Estate Plan		<input type="checkbox"/> Wills <input type="checkbox"/> Trusts <input type="checkbox"/> Letter of Instructions <input type="checkbox"/> Health Care Directives <input type="checkbox"/> Powers of Attorney <input type="checkbox"/> Beneficiary Designations
Insurance		<input type="checkbox"/> Life <input type="checkbox"/> Disability <input type="checkbox"/> Long term care <input type="checkbox"/> Liability <input type="checkbox"/> Property & Casualty <input type="checkbox"/> Health
Other Financial Documents		<input type="checkbox"/> Emergency Contacts <input type="checkbox"/> Prenuptial Agreements <input type="checkbox"/> Real Estate Deeds <input type="checkbox"/> Mortgage Settlement Statements <input type="checkbox"/> Employment Agreements <input type="checkbox"/> Unmanaged Accounts