# Documents Needed to Create Your Pickler Wealth Advisors Comprehensive Life Plan

- Included Confidential Client Profile
- Most recent statements for bank accounts, investment accounts, or retirement accounts [personal and employer-provided]
- Most recent statements for credit cards / mortgage / other loans
- Most recent statements and policies for any insurance contracts (life, long term care, disability, etc.) [personal and employer-provided]
- Any estate planning documents (wills, powers of attorney, etc.)
- Most recent pay stubs
- Annual social security statements
- Net worth statement
- Personal family budget / Spending plan
- Any other documents you believe will help us capture a comprehensive financial snapshot

*We respect your privacy, and our commitment is to protect your confidential information. The quality of our planning will be in direct correlation with your ability to provide to us complete and accurate information.

Pickler Wealth Advisors | 1135 Halle Park Circle, Collierville, TN 38017 | 901.316.0160 | www.picklerwealthadvisors.com