

Confidential Questionnaire Instructions

Please complete the attached [Questionnaire PDF document](#). **When completed**, click the “Submit by Email” at the top of the first page or you may print the completed document and bring it to your next meeting.

We also ask that you gather the following documents to bring to your meeting. Should you have any questions, please call Laura at (574)-271-6000 or (800)-667-4613. Thank you for your assistance in getting the process started.

Financial Documents Required: (bring only those that apply)

Personal

Need N/A

- Personal tax returns with W-2s – 2005 and 2006
- Most recent paycheck stubs
- Car insurance declaration page
- Motorcycle insurance
- Home insurance declaration page
- Jewelry/Special articles rider attached to home insurance
- Boat insurance
- Personal umbrella insurance
- Individual disability insurance policy
- Long term care insurance policy
- Most recent Social Security benefits statement
- Wills, trusts, durable power of attorney, health care representative and living will declaration
- Individual life insurance policies (for policies with cash value include most recent statement of value and in-force illustration)
- Most recent statements on all retirement and investment accounts
- Mortgage statement for each property
- Home equity line agreement
- Most recent property appraisal
- Most recent statement on home equity line
- Most recent statement on each car loan and/or original car lease agreement
- Most recent statement on each student loan
- Most recent statement on each non-zero balance credit card

Company Plans

- Most recent company benefit election form
- Most recent company summary of all your benefits
- Group short and long term disability booklets
- Group long term care
- Group medical, dental, vision booklets
- Group life booklets
- Group medical reimbursement and dependent care accounts
- Voluntary benefit plans (accident, sickness, cancer, hospital indemnity, etc.)
- Summary Plan Description of 401(k) plan
- Summary Plan Description of 403(b) plan
- Summary Plan Description of pension plan benefits and retirement payout options
- Summary Plan Description and most recent statement of Employee Stock Purchase Plan
- Summary Plan Description of stock options
- Schedule of stock options (including option price, expiration date, vested portion, etc.)

Business

- 2005 and 2006 business tax returns
- 2005, 2006 and YTD 2007 business financial statements
- Business insurance policies (e.g. workers compensation, liability, property)
- Business life insurance
- Buy/sell agreements
- Business agreements