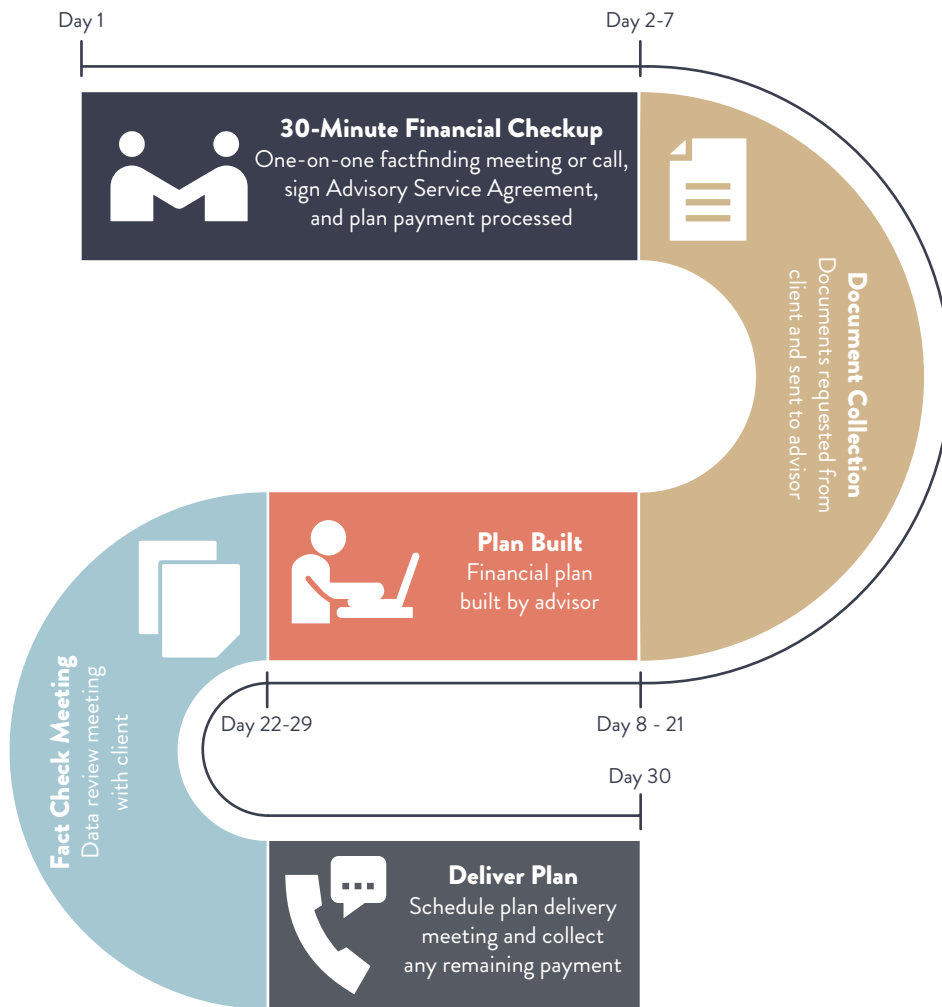


# THE PLANNING PROCESS

## Planning process and timeline:



## Documents Requested

Please submit documents by:

Recent Pay Stub

Budget

Tax Return

Bank Statements  
(past 2 months)

Credit Card Statement(s)

Student Loan Statement(s)

Mortgage Statement

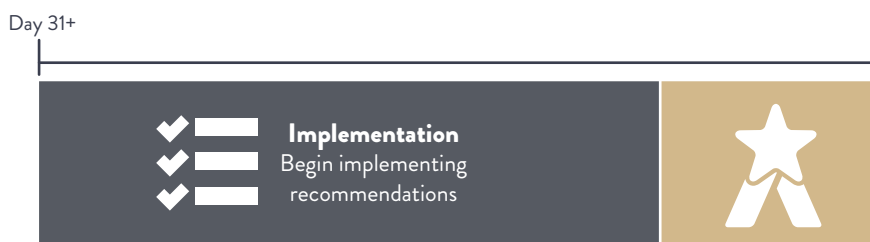
Other Liabilities  
(ex. car loan)

Retirement Plan Statements  
(401k, IRA, Roth IRA)

Non Retirement  
Investment Statements  
(brokerage account)

Estate Planning Documents  
(will, power of attorney, trust)

## Implementation timeline:



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