



JACK B. TURNER
& ASSOCIATES, INC.
Insurance/Financial Services

MAPPING YOUR FINANCIAL FUTURE

Documents Needed:

The following documents will be needed to properly study, analyze and prepare a strategy for you. This material will be treated confidentially and returned when the process is completed, or earlier if requested.

From Your:

Personal Files

- Latest income tax returns
- Loan documents
- Trust agreements
- Wills

Employer

- Payroll or other income statements
- Pension plans
- Retirement savings plans
- Employee benefits booklets

Bank or Credit Union

- Checking account statements
- Credit card statements
- Savings/CDs/Money Market account statements

Broker or Mutual Fund Company

- Latest monthly statements

Insurance Company

- Latest life insurance/annuity account statements
- Long-term care policy information
- Health insurance and major medical policy information
- Disability income insurance policy information