**Edwin Lane Financial Services, LLC**
**FACT FINDER**

1) Three years business and personal tax returns (Three years so we can trace carryovers and accounting methods) including retirement plan returns

2) Summary Plan Descriptions of all pension and profit sharing plans

3) Summary of named beneficiaries of the retirement plan accounts

4) Plan Descriptions of all deferred compensation plans

5) Corporate buy-sell agreements, or any other business redemption agreements

6) Last statement of the 401(k) investments (probably from Fidelity or Schwab)

7) Current business profit and loss statement and balance sheet

8) Summaries of any life insurance policies on you or your wife, type, death benefits, cash values, annual premiums, etc.

9) Summaries of any disability policies on you or your wife (in replacement, business overhead expense and business buyout agreements)

10) Summaries of all your loans, both personal and business

11) Personal income statement and balance sheet. If not available, then balances on credit cards, auto loans, savings & checking accounts, investment accounts, house value, etc

12) Summaries on any other investment vehicles you have such as art, wine, jewelry, etc.

13) Summaries on any investment vehicles you have for your child, UGMAs or 529 college plans

14) Copies of wills, revocable living trusts, irrevocable trusts, articles, bylaws, and other legal documents that affect your financial situation