



21201 Victory Blvd Suite 152
Canoga Park, CA 91303
Eric@ThePeakFP.com
818-600-6099

Document Gather Checklist (In advance of “Get Organized” Meeting)

1. Account balances - Cash accounts, investment accounts, everything you have that is electronically documented. Statements would be best if possible rather than just screenshots of the balance totals.
2. Debts – Include car loans, CC debt, Mortgage statements etc. If possible, please link your loan accounts (CC/Car) to RightCapital
3. Income – w2, 1099, K1 any documentation of your current individual income.
4. Social Security Statements (you can pull these from SSA.gov)
5. Pension documents
6. Retirement package documents
7. Business structure - are you Sole proprietorship or do you have an LLC / S Corp
8. Most Recent Tax Return
9. Investment accounts - Account statements are great, but linking to RightCapital is even better if possible. If you have crypto accounts, those will not link to right capital at this time, but account statements would be great in lieu of that.
10. Insurance Policies – Life insurance, Homeowners insurance, auto insurance, anything else that you have in place



21201 Victory Blvd Suite 152

Canoga Park, CA 91303

Eric@ThePeakFP.com

818-600-6099

11. Estate documents – wills, trusts, Power of Attorneys, Medical Directives, etc

12. Life events – any goals or events that come to mind