FINANCIAL DATA CHECKLIST

Client: ______________________________ Date: __________________

GENERAL DOCUMENTS

- ☐ Completed Questionnaire
- ☐ Master Report
- ☐ Present Position Worksheets
- ☐ Strategy Worksheets
- ☐ Business Documents
- ☐ Copies of Original Documents
- ☐ Life Insurance Illustrations
- ☐ Tax Returns
- ☐ Loan & Credit Card Statements
- ☐ Underwriting Documents
- ☐ Meeting Notes

LEAP MODEL DOCUMENTS

PROTECTION

- ☐ **P1-P3** Auto, Home & General Liability
- ☐ **P4** Disability and Long-Term Care
- ☐ **P5** Medical Insurance & Company Benefits
- ☐ **P7-P8** Wills & Trusts
- ☐ **P9** Life Insurance Policies

SAVINGS

- ☐ **S1-S6** Bank Accounts
- ☐ **S7** Annuities, Life Insurance Cash Value, Post Tax IRA & 401(k)s
- ☐ **S8** College Funding Statements
- ☐ **S9** Retirement Plan Statements

GROWTH

- ☐ **G1-G6** Investment Account
- ☐ **G7** Appraisals of Collectibles
- ☐ **G8** Mortgage Statements & Appraisals
- ☐ **G9** Business Shelters

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