In the Peace of Mind Business™

IBEX Capital — Financial Planning Document Checklist

Personal & Family

- [ ] Driver’s license(s) and Social Security card(s)
- [ ] Most recent estate documents (wills, trusts, powers of attorney)
- [ ] Marriage certificate or divorce decree (if applicable)
- [ ] Insurance policies (life, disability, long-term care, property & casualty)

Income & Employment

- [ ] Most recent pay stub(s)
- [ ] Last two years’ tax returns (personal and business, if applicable)
- [ ] Employment contracts, equity awards, or deferred compensation statements

Assets

- [ ] Bank account statements (checking, savings, money market)
- [ ] Investment account statements (brokerage, IRA, 401k, annuities, etc.)
- [ ] Real estate deeds, mortgage statements, and property tax bills
- [ ] Business ownership documents (K-1s, partnership agreements, buy/sell agreements)

Liabilities

- [ ] Loan statements (mortgage, auto, student, credit cards, lines of credit)
- [ ] Business liabilities or guarantees

Retirement & Benefits

- [ ] Pension estimates or retirement plan summaries
- [ ] Health insurance and group benefits summaries

Additional Items

- [ ] Recent financial plan (if one exists)
- [ ] Any other documents you believe may be relevant to your financial picture

How to Submit

- [ ] Upload to our secure portal: Secure Document Upload
- [ ] Return by email (if preferred)