SALTBOX
FINANCIAL

DOCUMENTS CHECKLIST

These documents help us get your complete financial picture.
Gather all applicable for our first meeting.

- [ ] Checking + Savings Account Statements
- [ ] Investment Account Statements
- [ ] Personal Retirement Statements
- [ ] Workplace Retirement Statements
- [ ] Workplace Retirement Plan Choices
- [ ] Credit Card Statements
- [ ] Mortgage + Housing Statements
- [ ] Student Loan Statements
- [ ] Social Security Earnings History (Via SSA.gov)
- [ ] 1-2 Recent Paystubs
- [ ] Most Recent Tax Return