



SageBroadview

DATA REQUEST FORM

In order for us to provide you with a complete and accurate analysis of your financial situation, we require certain information from your files.

Please note that we prefer to receive this information electronically as PDF files sent via our secure document sharing service: <http://sagebroadview.leapfile.net>

If you prefer to send us paper documents, we will make copies of any originals and return them to you.

YES N/A

Completed cash flow spreadsheet

Mortgage: Latest billing statement and origination details of loan

Equity Line of Credit: Latest billing statement

Credit Cards: Latest billing statements (if applicable)

Pay stub(s) covering the last 30 days

Employee benefits package/booklet/summary plan descriptions

For self-employed - P&L for current and last year

Bank and brokerage statements with details of investment holdings

401(k), 403(b), 457 and IRA (Regular, SEP, Roth, Simple) statements & investment options

Equity Compensation statements with vesting schedule details

Annuity statements & original contracts (if available)

Copies of personal insurance declaration statements: Auto, home, liability

Copies of life, disability, long-term care insurance policies

Information regarding medical insurance: premium, benefits

Social Security benefit estimate statements

Statement of estimated pension benefits

Most recent federal and state tax returns, all schedules

Last Year W2 Form

Estate Planning Documents: Wills, Trusts, Powers of Attorney and Living Wills

Other:

Other: