WALKER FINANCIAL ADVISORS, INC.
Registered Investment Advisor

FINANCIAL PLANNING DOCUMENTATION CHECKLIST

Please bring the documents for use in preparing your financial profile:

( ) Income tax return for last year - personal

( ) Earnings pay statements - withholding statements for latest month

( ) Latest statements from IRA, KEOGH and retirement plans

( ) Latest statements from brokerage accounts

( ) Latest statements from mutual fund accounts

( ) Current Trust documents

( ) Life insurance policies, latest statements and loan data

( ) Deferred compensation and stock option agreements

( ) Annuity policies

( ) Pension/profit sharing plans for your business

( ) Current mortgage statement

( ) Social Security benefit statement

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