Merkle
RETIREMENT PLANNING

DOCUMENTS CHECKLIST

Below is a list of documents we will need. Statements should list individual investment positions. A link to upload statements will be provided. Please upload scanned documents or PDFs only.

Uploading your documents to the provided link is the most secure way to transfer them digitally. If you do not feel comfortable uploading your documents you can drop them off at the office.

INVESTMENT ACCOUNT STATEMENTS

- [ ] 401(k), 457, 403(b), TSP
- [ ] IRAs - Traditional, Roth
- [ ] Brokerage/Non-qualified

INCOME INFORMATION

- [ ] W2 and/or Pay stub
- [ ] Social Security statement(s)
- [ ] Pension Information

TAXES

- [ ] Tax Return - from the previous year