



“Alexa, open the Flourish Financially Challenge.”

Key Financial Documents to Gather and Discuss With Your Spouse or Partner

- Life Insurance Policies
- Disability Policies
- Auto, Homeowners, and Umbrella Policies
- Long-term Care Policies
- Information on Medical Policies
- Business Owners—Buy-Sell Agreements, Key Person
- Insurance Policies
- Most Recent Federal and State Tax Returns (Including All Schedules)
- Bank and Investment Statements (Including Details of Investment Holdings for All Personal & Retirement Accounts)
- Paystubs
- Social Security Estimate of Benefits
- Employee Benefit Information Including Stock Options or Employee Stock Purchase Plans
- Statements for Mortgages, Lines of Credit, or Other Debt
- Current Credit Score
- Cash Flow and Spending Information
- Wills, Trusts, Health Care Directives and Powers of Attorney