**For your Statement of Net Worth, please provide the following when you submit your Statement of Net Worth:**

1. Last three years tax returns with all W-2s (not summary), 1099s, and schedules;
2. Current paystubs. Please indicate if you are paid weekly, biweekly, bimonthly, etc.;
3. Back up documents for all of your assets listed (ex: pensions, whole life insurance, bank accounts, etc.);
4. Your Social Security Earnings Statement. You can get this here: <https://www.ssa.gov/myaccount/statement.html>
5. Please get values of assets and debts as of one date (i.e., March 1st, 2000)

**On the budget portion of the Statement of Net Worth:**

1. The budget should NOT include your spouse. This is your anticipated budget.
2. Please indicate whether the amount you have entered is monthly, weekly, biweekly, or annually. It is preferred that you fill this out monthly.
3. If you put a dollar amount under “other” in any category, please specify what the “other” is exactly.
4. **Please complete as much of the information for each account you list under assets and liabilities as possible.** (i.e. creditor name & address, title holder, current balance, monthly payments, etc.)
5. For deductions that come out of your paycheck, please do not round off the dollar amounts that are deducted, use exact amounts.
6. Please do not enter words in an area that asks for a dollar amount. It can only be one number (i.e $100.00). Please do not put a range (i.e. $100-$500)
7. On lines where it specifically asks for a date, please only enter a numerical date (i.e 3/1/2000, or 1990) Please do not enter date ranges (mid to late 90’s) or a combination of dates (1991, 1992, 1993)
8. Vehicles – Kelley Blue Book values are required. Please use the private party sale option.
9. 401-ks, IRAs, Defined Benefit Plans, etc., should all be listed under the “Retirement Accounts” section.
10. If you need additional space, please feel free to add on a blank sheet of paper and attach it to your Statement of Net Worth when you return it to our office.

**Please contact us with any additional questions or concerns.**