



Documents Needed for Fact Gathering Meeting

Be sure to log in to your GPS HARVEST Membership at www.FarmEstateGPS.com/harvest-members-page for additional videos & resources on preparing for planning meetings.

1) Client Information Sheet

- Family and advisor information

2) Legal Documents

- Wills and/or Trust agreements
- Buy-Sell farm continuation agreements
- Corporate agreements

3) Deeds to Real Estate Property (if available)

How is each piece of property owned? (Husband, wife, joint tenants, tenants-in-common, entity structure, life estate deed, etc.)

You may already know how each property is owned. If not, a copy of the deed will answer it. We can go back for this later if necessary.

4) Financial Statement / Balance Sheet (if available)

- Most recent year (personal and corporate statements)

5) Cash and Investment Account Statements

- Checking and savings accounts (personal and farm)
- CD's, stocks, bonds, and mutual funds

6) Retirement plan account statements and documentation

- Traditional IRA, SEP IRA, 401(k), Roth IRA
- IPERS, Pension, Social Security

7) Recent insurance account statements

- Life insurance and annuities
- Long Term Care

Locating these documents prior to the Fact Finder Meeting is very helpful. HOWEVER if you are unsure of what you are looking for or cannot find something, please DO NOT worry or feel that you should delay the meeting until everything is available. We can always circle back and gather the information as needed.

Client Information Sheet

PERSONAL CONTACT INFORMATION

<i>Husband (First/Middle/Last)</i> _____	Birth Date _____	Cell Number _____
<i>Wife (First/Middle/Last)</i> _____	Birth Date _____	Cell Number _____
Address _____	City _____	State _____ Zip _____
Best Email _____	Fax _____	

DEPENDENTS

<input type="checkbox"/> Do you have any step or adopted dependents?	<input type="checkbox"/> Do any dependents have special needs?		
<input type="text"/> Tell us about your children...			
Name (<i>First M. Last</i>) _____	Birth Date _____	Children _____	Situation (<i>Married, Occupation, Location</i>) _____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

OFF FARM OCCUPATIONS (If any)

<i>Husband</i> _____	Employer _____
Address _____	City _____ State _____ Zip _____
Phone _____	Fax _____
<i>Wife</i> _____	Employer _____
Address _____	City _____ State _____ Zip _____
Phone _____	Fax _____

ADVISOR CONTACT INFORMATION

<input type="text"/> <i>Attorney</i> _____	Firm _____
Address _____	City _____ State _____ Zip _____
Phone _____	Fax _____
<input type="text"/> <i>Accountant</i> _____	Firm _____
Address _____	City _____ State _____ Zip _____
Phone _____	Fax _____