Harvest
ASSET GROUP · LLC

DATA REQUEST FORM

CLIENT NAME: ________________________ Date: ___/___/_____

- ☐ Cash Flow Work Sheet
- ☐ Risk Tolerance Questionnaire
- ☐ Recent Mortgage Statement and/or Personal Note Statement
- ☐ Social Security Benefit Report (s)
- ☐ Bank Statement(s)
- ☐ Brokerage Account and Mutual Fund Account Statement(s)
- ☐ Home Equity Line of Credit Statement
- ☐ Retirement Plan Account Statement(s) and Summary Plan Doc
- ☐ Paycheck Stub(s) and W-2's
- ☐ Employee Benefits Book
- ☐ Prior Year Tax Return – Both Federal and State
- ☐ Cost Basis in Investment Accounts
- ☐ Insurance Policies ☐ Disability ☐ Life ☐ Auto
- ☐ Beneficiary forms (IRA's, 401k's, life insurance policies)
- ☐ Trust Documents ☐ Client 1 ☐ Client 2
- ☐ Wills ☐ Client 1 ☐ Client 2
- ☐ Service Agreement and Deposit
- ☐ Goal Refinement Document –Separate Document will be sent via email
- ☐ Other: