Thomas financial advisors
- REGISTERED INVESTMENT ADVISORS -

1040 S Gaylord St.
Denver, CO 80209

Document Request Checklist

- ☐ Complete risk tolerance questionnaire. See welcome email for link and instructions.
- ☐ Social Security Statement(s). Log in to ssa.gov and click ‘Sign In/Up’ and click ‘my Social Security’ to set up your account and download your statement.
- ☐ Prior year tax returns (personal & business), if not previously provided during the Discovery process.
- ☐ Recent W-2, pay stub or payroll summary statement.
- ☐ Employer benefit document, including 401(k) plan information, equity compensation plan information, etc.
- ☐ Account statements (IRA’s, 401(k)’s, 529’s, brokerage, etc), if not linked to the client portal.
- ☐ Life insurance contract/statement.
- ☐ Estate planning documents.
- ☐ All debt statements, including mortgage, student loans, car loans, etc.