

Document Checklist for Discovery Meeting

In order to maximize our time together, please provide as much information as possible.

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|--|--------------------------|---|
| Income | <input type="checkbox"/> | Last year's tax return, recent paystub |
| | <input type="checkbox"/> | Recent Paystub |
| Cash | <input type="checkbox"/> | Checking account statements |
| | <input type="checkbox"/> | Savings / money market account statements |
| Retirement | <input type="checkbox"/> | Most recent statements for employer sponsored retirement plans (401k, 403b, Profit Sharing, etc.) |
| | <input type="checkbox"/> | Most recent statements for IRAs, Roth IRAs, etc. |
| | <input type="checkbox"/> | Social Security Estimate of Benefits |
| Brokerage Accounts | <input type="checkbox"/> | Most recent statements |
| Education Funds | <input type="checkbox"/> | Most recent statements for 529 accounts, minor accounts, etc. |
| Insurance | | Policies, employee handbooks, etc. outlining coverages |
| | <input type="checkbox"/> | Life Insurance |
| | <input type="checkbox"/> | Disability / Long Term Care |
| | <input type="checkbox"/> | Health Insurance |
| | <input type="checkbox"/> | Home & Auto & Liability Coverage |
| Real Estate | <input type="checkbox"/> | Details on home(s), vacation property, etc. |
| Debt | <input type="checkbox"/> | Mortgage & Home Equity Line of Credit |
| | <input type="checkbox"/> | Auto or other fixed asset loans |
| | <input type="checkbox"/> | Unsecured debt (credit cards, student loans, etc.) |
| Estate Plan | <input type="checkbox"/> | Wills & Trusts |
| | <input type="checkbox"/> | Power of Attorney |
| | <input type="checkbox"/> | Living Will / Medical Directives |
| Business Ownership
(if applicable) | <input type="checkbox"/> | Business Valuation |
| | <input type="checkbox"/> | Balance Sheet |
| | <input type="checkbox"/> | Business Sucession Plan |
| Expenses | <input type="checkbox"/> | Estimated Monthly Expenses |
| | <input type="checkbox"/> | Future Anticipated Expenses or Large Purchases |