



Important Documents List

To make our Discovery Meeting as productive as possible, please bring the following:

1. Your last two years' income tax returns
2. Any recent financial statements prepared for refinancing, etc.
3. A summary of your monthly and annual expenses – current and expected
4. Current bank statements, if any
5. Current mutual fund statements, if any
6. Current brokerage statements, if any
7. Current mortgage statements, if any
8. Current life insurance policies, if any
9. Current employee benefit statements, including those for 401(k) or other retirement plans, if any
10. Current Social Security benefit Statements
11. Any wills or trust documents
12. Anything else you believe would be useful for us to gain a better understanding of your financial situation

There is no need to make copies of the documents. We will have copies made while we're meeting.

If you have problems locating any of the information, please give us a call so we can help direct you to the proper source to obtain the necessary information.

We look forward to exploring how we might be able to assist you in achieving your financial goals.