Discovery

Document Checklist

To help make your meeting as productive as possible, please bring original copies of the items listed below. If necessary, we will make copies during your meeting. If you have a problem locating any of the information, please give us a call so we can help direct you to the proper source to obtain the necessary documents.

- [ ] Most recent payroll stub (if applicable)
- [ ] Income tax returns (2 years preferred)
- [ ] Social Security Benefits Statement
- [ ] Employee Benefits Statements (Group Benefits and Retirement Plans)
- [ ] Investment statements (brokerage, mutual funds, IRA, Roth, CD, etc.)
- [ ] Insurance and/or annuity contracts
- [ ] Any other information that will assist in our evaluation of your finances

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