Discovery

Document Checklist

Client Name: ______________________________

To help make your Discovery Meeting as productive as possible, please bring original copies of the most recent documents listed below. If possible, please send your documents to us ahead of your meeting. To help ensure the safety and security of your personal information, our team will send you an encrypted email. Simply reply directly to the encrypted email and attach your documents to ensure your personal information is only accessible by you and the intended party.

» Please prepare and return these documents to us by: ______________________ «

- ☐ 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.)
- ☐ Any other information that will assist in our evaluation of your finances

Important Note: For Invesment Statements, screenshots and summary statements are not sufficient. We need complete statements identifying custodial firm and investment-specific account detail (i.e. specific invesments, allocations, dollar values, etc.).

Experiencing difficulty locating the information above? Give us a call at 810-593-1624. We can help direct you to the proper source to obtain the necessary documents.

Additional Notes:

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