

# Client

## Discovery Meeting Checklist

This list serves as a guideline for items to bring to our first meeting. Please keep in mind that all items may not be applicable to your situation. Use the checklist below to check off the items as you gather the necessary documents. As a reference, please bring this sheet and your documents to our first meeting.

### What to Bring to Our First Meeting

Please bring the most recent statements for the accounts listed below.

- Checking and savings accounts
- Social Security statement
- Investment and brokerage account statements
- Retirement, annuities and employer-sponsored plans (401k, etc.)
- Loan balances (mortgage, auto, credit card, student loan, etc.)
- Estate planning documents (will, power of attorney, trust, etc.)
- Insurance policies (life, disability, long-term care, etc.)

### Things to Consider Prior to Our First Meeting

- What type of legacy do you want to leave?
- What are your financial goals? Are you on track to achieving them?
- Are you comfortable with your current financial outlook?
- Do you have debt or loans? Is it a priority to pay off your debt in the near future?
- Have you started planning for retirement? What is your time horizon?
- What are your retirement goals? How close are you to achieving them?
- How satisfied are you with your current retirement savings?
- Are there any goals you would like to cover that we have not addressed?