

What to bring to your Discovery Meeting. Please bring (or have available):

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

If you bring in the originals of each of the documents our friendly staff will make copies while were meeting.

If you have any 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.