

Discovery Meeting Checklist

Name: _____

Date of birth: _____

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- Copy of most recent tax return
- Copy of pay stub(s)
- Employment benefits description
- Most recent 401(k) statements and investment choices / selections
- Pension information
- Social Security statement www.ssa.gov
- Other retirement income information (real estate, settlements, buyouts, severance, etc.)
- Investment account statements (brokerage, IRA, bank, trust, private, etc.)
- Other assets information (real estate, oil & gas, precious metals, etc.)
- Summary of liabilities
- Mortgage statement
- Life insurance declarations page & current annual statement
- Long term care declarations page & current annual statement
- Copy of will and / or trust

Names of children / dependents:

Dates of birth:

Estate Planning Attorney: _____

CPA / Tax Advisor: _____

Insurance Agent: _____

Emergency contact: _____