Discovery Checklist

To make our time together as efficient as possible and so that we can effectively create your custom Wealth M.A.P., please bring copies of the following documents to your upcoming *Discovery Meeting*:

Most Recent Statements for your Banking and Investment Accounts

- Checking / Savings / Money Market
- Brokerage
- Retirement Accounts (401k, 403b, 457b, IRAs, etc.)
- Annuities

Most Recent Statements for any Liabilities

- Mortgage and Home Equity Lines of Credit
- Student Loan
- Business / Personal Loan
- Line of Credit
- Credit Cards

Benefit Page / Summary Statement for the Following Insurance Policies

- Life Insurance
- Disability Income Insurance
- Long Term Care Insurance

Estate Planning Documents

- Will
- Trusts
- Durable Power of Attorney
- Health Care Surrogate
- Living Will

Most Recent Tax Return

If you have any questions or require additional guidance, please call our office at 954-384-5292 or via email at Tara@LifeCraftWealth.com.

We look forward to seeing you!

This information is based on assumptions provided by you, the client, and have been unverified. If any of the assumptions are incorrect, you should notify your financial advisor. The information provided by you should be reviewed periodically and updated when either the information or your circumstances change.