COTTONWOOD
CAPITAL ADVISORS

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Discovery Meeting Checklist

- ☐ The names and contact information of individuals who provide advice on your finances (Attorney, Accountant, Banker, Insurance Agent, Etc.)
- ☐ The names and birthdates of all your heirs (Children, Grandchildren, Other)
- ☐ A rough outline of your monthly household expenses
- ☐ A rough outline of significant future expenses
- ☐ Copy of your pay stub
- ☐ Employment benefits description
- ☐ Most recent 401(k) statements and investment choices/selections
- ☐ Pension information
- ☐ Social Security Statement (https://www.ssa.gov/myaccount/)
- ☐ Other retirement income information (Real Estate, Oil & Gas, Settlements, Buyouts, Severance, Etc.)
- ☐ Investment account statements (e.g., Brokerage, IRA, Bank, Trust, Private, Etc.)
- ☐ Other assets (Real Estate, Oil & Gas, Precious Metals, Art, Etc.)
- ☐ Summary of liabilities
- ☐ Life insurance policies and most current annual statement
- ☐ Long-term care policies
- ☐ Disability policies
- ☐ A copy of your will and trust documents
- ☐ Potential inheritance of cash or assets