

DISCOVERY MEETING

CHECKLIST

Please provide the most recent statements of all applicable items in the checklist below.

- ▶ Any financial statements recently prepared
- ▶ Bank statements
- ▶ Mutual fund statements
- ▶ Brokerage statements
- ▶ Mortgage statements
- ▶ Life insurance policies
- ▶ Employee benefit statements: 401(k) and employee retirement plans
- ▶ The past two years' income tax returns
- ▶ Any wills or trust document(s)
- ▶ Anything else you believe would be useful for me to gain a better understanding of your financial situation

RAYMOND JAMES[®]

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