Discovery Meeting Checklist

An optional guide to help you prepare for our conversation

Crespo Capital

To make our time together as productive as possible, we invite you to gather the following documents. Please do not feel obligated to bring everything; this list is simply a guide to what will be most helpful for our initial discovery meeting. All information will be kept in the strictest confidence.

Income

- [ ] Most recent pay stubs (for you and your spouse, if applicable)
- [ ] Last two years of W-2 or 1099s
- [ ] Information on other income sources (e.g., rental, business, K-1s)

Assets

- [ ] Recent statements for all bank accounts (checking, savings)
- [ ] Recent statements for all investment accounts (brokerage, IRA, Roth IRA)
- [ ] Recent statements for all retirement plans (401k, 403b, SEP IRA)
- [ ] Estimates of real estate value (primary residence, other properties)

Liabilities

- [ ] Recent mortgage statements for all properties
- [ ] Statements for any other loans (student, auto, practice/business)
- [ ] Current credit card balances

Other Important Documents

- [ ] Last two years of filed federal and state tax returns
- [ ] Summaries of any insurance policies (life, disability, long-term care)
- [ ] Copies of any existing estate planning documents (wills, trusts)

Crespo Capital

inquiries@crespocapital.com