Client Discovery Form

Client(s) Info	
Name	Birthday

Dependent(s) Info	
Name	Birthday

COIGN CAPITAL

ADVISORS

Goals
Work (dream position, earnings, accomplishments, etc.)
Retirement (age/year of retirement goal, amount in savings, etc.)
Family (future tuition, family vacations, etc.)
Charity (donations, beginning a foundation, etc.)
Other (fun, vacations, boats, etc.)

Document Checklist	
- Recent paystubs (3-4 previous pay periods), bank statements and credit card statements	✔
- Latest employee benefit information (retirement benefits, health/life/disability insurance, etc.)	✔
- Employer account statements (stock options, ESPP, Restricted Stock Units, etc.)	✔
- Federal & State tax returns (last 2 years)	✔
- Mortgage statement and other loan information	✔
- Investment account statements (IRAs, 401(k)s, taxable/brokerage accounts, etc.)	✔
- Recent social security statements and other retirement income documentation	✔
- Estate documents (wills, trusts, medical directives, power of attorney, etc.)	✔