FINANCIAL PLANNING: STEP 2 OF 5

COLLECTION

WHAT

Client Activity

WHEN

Months 1-2

GOALS

✓ Collect all the documents listed on your Discovery "homework" checklist.

TIPS ON GATHERING MATERIALS

We know life gets busy. That's why we give clients several weeks to gather all their financial documentation. We'll need each and every piece of the puzzle to accurately model out your future financial scenarios. Things to remember:

- All documentation must be turned in 2 WEEKS BEFORE your first financial planning session.
- You may turn in documents in person or via Crooks & Company secure email.
- We do not accept screen shots. Official documents only.
- When in doubt, give us a call. We often help clients track down elusive documents.

503.723.9580 | operations@crooksandcompany.com