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Documents Checklist

Account statements

- ☐ Bank accounts
- ☐ Brokerage accounts
- ☐ Mutual fund accounts
- ☐ Dividend reinvestment plan accounts
- ☐ Retirement accounts
- ☐ Annuities

Other assets

- ☐ Individual securities certificates
- ☐ Other major asset statements/valuations

Liabilities

- ☐ Real estate mortgages (primary, secondary, rental)
- ☐ Secured/non-secured loan statements

Income

- ☐ Recent pay stub
- ☐ Social Security statement
- ☐ Pension account statement

Taxes

- ☐ Federal return

Insurance policies

- ☐ Life insurance
- ☐ Disability insurance
- ☐ Long-term care insurance

Estate planning

- ☐ Wills
- ☐ Trusts
- ☐ Powers of attorney, health care directives

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