



INVESTMENT CENTER —ADVISOR GROUP—

Located at Guaranty Bank and Trust Company
300 E 29th Street, Loveland, CO

Phone: 970-622-2366

- Current investment account statements
(Mutual Funds, Annuities, IRAs, Brokerage Accounts)
- Bank account and CD statements
- Most recent tax return
- Life insurance statements
- Long-Term care insurance statements

Notes:

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