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ASSETS:

- Bank Statements (balances only)
- Investment Statements
- Retirement account statements
- Roth Statements
- Social Security Statements
- Pensions Statements

LIABILITIES

- All debt related statements:
- Mortgage
- Auto
- Student Loans
- Business Loans
- Credit Cards, etc.

PROTECTION:

- Benefit Handbook
- Life Policies
- Disability Insurance Policies
- Long-Term Care Insurance Policies
- Property & Casualty Statement
- Legal Documents

OTHER:

- Previous year's tax return
- Three consecutive paystubs

Notes:
