If possible, we ask that you have the following documents available. Don't worry if you don't have everything, we can always fill in the blanks later.

Documents:

- Bank account statements
- 401k, IRA and other investment account statements
- Recent paystub(s)
- Retirement benefit statement or booklet, if applicable
- Social Security statement(s)
- Insurance summaries, if applicable.
    - Life Insurance: Death benefit, premium, policy type.
    - Long Term Care: Policy details from benefit statement page.

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