

# Investment Solutions

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## DATA TO GATHER:

### ASSETS:

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

### LIABILITIES:

- All debt related statements:
- Mortgage
- Auto
- Student loans
- Business loans
- Credit cards
- Etc.

### PROTECTION:

- Benefit handbook
- Life policies
- DI Policies
- LTC Policies
- P&C Statement
- Legal docs

### OTHER:

- Previous year's tax return
- Three consecutive paystubs

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