

Documents List



- All investment statements
- Life insurance policies and most recent statements
- Disability insurance policies and most recent statements
- Other insurance policies and most recent statements i.e.:
homeowners, automobile, personal liability, long term care
- Employer benefit booklet and most recent statement; include
summary plan descriptions of retirement plans and pensions
- Current bank statements
- Recent pay stub
- Mortgage statement
- Loan statements
- Most recent tax return & W2's
- Copy of Driver's License
- Wills and trust documents
- Recent valuations on investment property and businesses
- Social Security statements from www.ssa.gov

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Peter Oldziej CA Insurance License # 0D0814; Brett Emmons CA Insurance License # 4039009

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