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FINANCIAL

Your Financial Strategy Checklist:

___ Latest tax return

___ Latest social security statement (retrieve at ssa.gov)

___ Investment documents (brokerage statements, CD statements, etc.)

___ Earnings statements (paycheck stub, etc.)

___ Recent personal benefits statement/retirement estimate (federal employees)

___ Statements from IRA, 401(k), TSP and other retirement plans

___ Statements from mutual funds

___ Annuity contracts and latest statements

___ Life insurance policies (apart from work group life policies, i.e., FEGLI)

___ Copies of all beneficiary forms

___ All other insurance policies (disability, home, auto, umbrella)

___ Employee benefits booklets

___ Wills and trust documents

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