



DOCUMENT CHECKLIST

Personal Information

- | | |
|--|--|
| <input type="checkbox"/> Birth Certificates | <input type="checkbox"/> Social Security Cards |
| <input type="checkbox"/> Marriage Certificates | <input type="checkbox"/> Driver's Licenses & IDs |
| <input type="checkbox"/> Death Certificates | <input type="checkbox"/> Veteran's Service Documents |
| <input type="checkbox"/> Adoption Certificates | <input type="checkbox"/> Divorce Documentation |
| <input type="checkbox"/> Passports | <input type="checkbox"/> Name Change Documentation |
| | <input type="checkbox"/> Visa & Nationalization Papers |

Estate Planning Documents

- | | |
|--|---|
| <input type="checkbox"/> Revocable Living Trust | <input type="checkbox"/> Name, Address, & Telephone Number of Beneficiaries |
| <input type="checkbox"/> Last Will & Testament | <input type="checkbox"/> End-of-Life Arrangements |
| <input type="checkbox"/> Healthcare Power of Attorney | <input type="checkbox"/> Ownership Papers for Businesses |
| <input type="checkbox"/> Financial Power of Attorney | <input type="checkbox"/> Documentation for Other Significant Assets |
| <input type="checkbox"/> Life, LTC & Disability Insurance Policies | |

Asset Documentation

- | | |
|---|---|
| <input type="checkbox"/> Vehicle Registration & Title Certificates | <input type="checkbox"/> Other Investment Statements |
| <input type="checkbox"/> Location of Safe Deposit Boxes & Keys | <input type="checkbox"/> Bank Statements/Bank Books |
| <input type="checkbox"/> Location & Combinations for Safes | <input type="checkbox"/> Deeds for Real Property |
| <input type="checkbox"/> Location of Storage Units | <input type="checkbox"/> Promissory Notes & Loans Owed to You |
| <input type="checkbox"/> Home, Vehicle & Umbrella Insurance Policies | <input type="checkbox"/> Country Club, Yacht Club & Other Memberships |
| <input type="checkbox"/> Pension, Profit-Sharing, or Other Retirement or Death Benefits | <input type="checkbox"/> Union, Fraternal & Trade Societies with Benefits |
| <input type="checkbox"/> Mutual Fund Statements | <input type="checkbox"/> Documentation for Any Other Significant Assets |
| <input type="checkbox"/> Stock & Bond Certificates | |

Liability Information

- | | |
|--|--|
| <input type="checkbox"/> Credit Card Statements | <input type="checkbox"/> Vehicle Loan & Lease Statements |
| <input type="checkbox"/> Mortgages/Leases Statements | <input type="checkbox"/> Federal or State Taxes Owed |
| <input type="checkbox"/> Lines of Credit | <input type="checkbox"/> Other Money Owed |

Tax Information

- | | |
|---|---|
| <input type="checkbox"/> Federal Income Tax Returns (Last 4 Years) | <input type="checkbox"/> Federal Gift Tax Returns |
| <input type="checkbox"/> State Income Tax Returns (Last 4 years) | <input type="checkbox"/> State Gift Tax Returns |
| <input type="checkbox"/> Internal Revenue Service Audit Documentation | <input type="checkbox"/> Federal Fiduciary Returns |
| <input type="checkbox"/> State Tax Board Audit Documentation | <input type="checkbox"/> State Fiduciary Returns |
| | <input type="checkbox"/> Real Estate Tax Statements |