HOSPICE GIVING FOUNDATION

Life Stages: Financial Planning for Peace of Mind

IMPORTANT DOCUMENTS CHECKLIST

Basic Information

- ☐ Birth Certificate
- ☐ Marriage Certificate
- ☐ Death Certificate
- ☐ Titles to property and assets
- ☐ Veteran's Affairs file number
- ☐ Military records
- ☐ Membership cards

Retirement Planning Documents – Be sure to include up-to-date beneficiaries

- ☐ Recent IRA, 401(k), 403(b), TSA, Keogh statements
- ☐ Employee benefits program, if applicable
- ☐ Deferred compensation and stock option agreements
- ☐ Pension and profit sharing statements

Tax Planning Documents

- ☐ Tax returns; ideally for last three years
- ☐ W-2 and a recent pay stub or 1099-R
- ☐ Current year tax documents

Knowing in advance where important documents are kept helps to reduce stress when your attention is needed in other areas. Consider cataloging all these documents in our organizing tool Notes to My Family.

Financial Documents

- ☐ Checking accounts and registers
- ☐ Savings account statements
- ☐ Mutual fund statements
- ☐ Brokerage account statements
- ☐ Investment documents
- ☐ Loan documents
- ☐ Business and/or partnership agreements
- ☐ Credit cards and statements

Insurance Documents

- ☐ Life insurance policies and statements
- ☐ Medical, homeowners, and auto insurance policies and statements
- ☐ Disability and umbrella policies
- ☐ Long term care insurance policies
- ☐ Annuity policies and statements

Estate Planning Documents

- ☐ Summary of your will, living will, durable powers of attorney and health care powers
- ☐ Living trusts

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Funding end-of-life care
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