

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

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

*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**.*



**NOTES TO
MY FAMILY**