

Document Checklist

And Other Online Valut Suggestions

- ___ Financial Statement – Summary of Assets and Liabilities
- ___ Investment Statements – With Specific Investments and Number of Shares
- ___ Retirement Plan Statements
- ___ Annuity Statements
- ___ Last Year's Tax Return (Business and Personal)
- ___ Wills and Estate Documents
- ___ Trust Agreements
- ___ Business Agreements
(Buy/Sell Agreements, Operating Agreements, Lease Agreements, Etc.)
- ___ Insurance Policy Information – Including Inforce Illustrations on Life Insurance
- ___ Homeowner's and Auto Insurance Policies
- ___ Cash Flow Statement
- ___ Mortgage and Any Other Loan Statements on All Properties
- ___ Deferred Compensation Agreements and Other Employee Agreements
- ___ Medical Insurance Policy

- ___ Any Instructions (Paying Bills Online, How to Contact Advisors)
- ___ Personal Letter To Family Members Telling Them You Love Them or
Anything Else You Want Them To Remember
- ___ Important Photographs That You Want To Be Saved Forever
- ___ Family Tree and Other Historical Family Information
- ___ Social Security Cards
- ___ Social Security Statements
- ___ Passports
- ___ Medication Information
- ___ Physician Contact Information
- ___ Special Doctor Information
- ___ Allergy Information



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Process™*

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