

DOCUMENT CHECKLIST

You may not have, or be able to locate, many of these documents.
Please bring photocopies of whatever you can.

Legal Papers

- Last Will & Testament
- Revocable Living Trust
- Durable Power of Attorney
- Designation of Patient Advocate
- Divorce Decrees
- Deeds to Property
- Mortgages or Land Contracts
- Promissory Notes
- Corporate and/or LLC Documents
- Pre-arranged Funeral Contracts
- Any Contracts in Your Name

Asset Information

- Bank Account Statements (Current)
- IRA and/or Retirement Statements (Current)
- Brokerage Account Statements (Current)
- Certificates of Deposit
- Stock and Bond Certificates
- Annuities
- Credit Card Statements (Current)
- Automobile Title
- Itemized List of Valuable Personal Property

Tax & Insurance Information

- Property Tax Statement
- Tax Returns (Last Year)
- Homeowner's Insurance
- Life Insurance
- Automobile Insurance
- Long-Term-Care Insurance

Personal Papers

- Birth Certificate
- Social Security Card
- Driver's License
- Marriage Certificate