

Financial Documentation & Maintenance Checklist

How Often	Financial Task	
annually	Goals review	
annually	Bill assessment & review	
annually	Benefits review	
2-3 years	Credit report	
2-3 years	Investment review	
2-3 years	Life Insurance review	
2-3 years	Home & auto insurance review	
2-3 years	Wills & POA review	
5-10 years	Passport renewal	
	(or when major life event or change occurs)	
	What to Keep (in) Safe	
	Passports	
	Appraisals for valuables ie. jewelry, antiques	
	Pension Statement	
	Safety deposit box details	
	Wills	
	Deeds & surveys for real estate	
	Life insurance policies	
	Licenses/certificates ie. marriage, business, death	
	Statement for each investment; RESP, RRSP, RIF	
	Statement for each bank account	
	Passwords	
	Back up for pictures	
	Health cards	
	Birth certificates	



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