

Document Check List:

Personal Documents

- _____ Copies of Will, Durable Power of Attorney
- _____ Health Care Directives - Living Will and Health Care Proxy
- _____ Trust Documents
- _____ Most Recent Investment Statements
- _____ Long Term Care Policy(s) copies of coverage
- _____ Form 1040 Income Tax for most recent year with supporting tax documents
- _____ Copies of most recent Annuity Statements
- _____ Copies of Pension Statements
- _____ Retirement Pension Statement
- _____ Social Security Statements
- _____ List of Liabilities with terms and schedules (mortgage, home equity)
- _____ Statements for any loan debt. (School, credit card, auto, personal loans, etc)
- _____ Copy of Deed and/or Property tax bill
- _____ Life Insurance statement listing premium cash value, death benefit and beneficiaries.
- _____ Any group life insurance you may have through employer
- _____ Disability Income Insurance statement listing premium and monthly benefit
- _____ Any Group Disability Income insurance you may have through employer