PEACE OF MIND CHECKLIST

This checklist is a simple tool to organize the important documents of your life. This may be something to share with close family members, financial professionals, attorneys, accountants and your executor. This is also something that can be added to your binder or folder that includes end-of-year statements for each account you have. There is space in here to write the location of the binder or statements if those are not kept with this.

If you have questions or need assistance completing this, please reach out to our office. You should consult your attorney and/or accountant regarding any legal and tax questions or documentation.

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Putting You First.™

Key Contact Information

NEXT TO EACH FILL IN NAME AND CONTACT INFORMATION

Executor: ....
....
....

Attorney: ....
....
....

Accountant:..
....
....

Financial Advisor:..
....
....

Insurance Agent:...
....
....

Health Care Provider: ....
....
....

Health Care Provider: ....
....
....

Your name: ....

Your address: ....

....

	Emergency Papers and/or Information	Location
✔	***General Items***	
	Birth Certificate	
	Social Security Card	
	Passport/Citizenship (naturalization papers)	
	Driver's license number expiration date	
	Adoption papers	
	Marriage certificate	
	Pre-nuptial agreement	
	Divorce or separation papers	
	Safe Deposit Box(es) and Keys	
	Safe and combination	
✔	***Investment Documents***	Company the account is held and the account number (notes pages at the end of booklet for additional space)
	Brokerage account statements	
	Mutual Fund account statements	
	Annuity Account statements	
	IRA Account Statements	
	Company Retirement Plan Statements	
	Other company benefits (ex. Deferred comp)	
	529 Plan accounts	
	Online securities account access	
	Beneficiary forms/information	

	Emergency Papers and/or Information	Location
✓	***Insurance Documents***	***Include companies, policy number and location of statement***
	Mortgage insurance policy	
	Property and Casualty policy documents	
	Auto Insurance policy	
	Veterans administration insurance papers	
	Beneficiary forms for insurance or annuity policies	
	Life insurance policies	
	Long term care insurance	
✓	***Personal Financial Documents***	
	Appraisals for valuable items	
	Inventory of valuable items	
	Buy/Sell Partnership agreements	
	Deferred compensation agreements	
	Prior year tax returns	
	Motor vehicle title and/or registration papers	
	Lawsuit or documents pending legal action	
	Promissory notes	
	Outstanding loans	
	Mortgage Documents	
	Medical bills/records	
	Real Estate deed and/or titles of ownership	
	Rental and/or lease agreements	
	Trust documents/agreements	

✓	Emergency Papers and/or Information	Location
✓	***Bank/Credit Documents***	
	Checking or money market account statements	
	Checks	
	Savings accounts	
	Credit cards	
	Emergency Documents	
	Living will/ Health Care proxy	
	Durable Power of attorny	

✓	Paperwork for Final Arrangements	Location
	Last Will and Testament Wills should not be kept in a safe deposit box. Wills should be stored in a lawyer's will safe or a fireproof safe at your home.	
	Military discharge papers - Veteran can receive a small stipend toward burial expenses	
	Cemetery Plot Deed	
	Pre-paid Cremation documents	
	Funeral home preference and information	
	Charitable donation preferences	
	Information for obituations (life story, biography, etc.)	

Things to be taken care of if I am unable to:

People I have told about this document:

NAMES AND CONTACT INFORMATION

At time of my Passing

Notify (names, contact information, relationship)

Funeral arrangments (wishes, funeral home, cremaition, burial etc.)

Notes

SPACE FOR ANY ADDITIONAL INFORMATION

Notes

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For assistance or more information, please contact our office at 888-567-2202

or

visit tsquaredfinancial.com