

<b>Financial Records</b>
Personal & Employment Records
Current Resume
Employment Benefit Information
Social Security Numbers
Birth Certificates
<b>Money Management Records</b>
Current Budget
Recent Personal Financial Statements
List of Financial Goals
List of Safety Deposit Box Contents
<b>Tax Records</b>
Pay Stubs, W-2 forms, 1099 forms
Receipts for Tax Deductible Items
Records of Taxable Income
Auto Service Records, Registration, Owner's Manual
<b>Housing Records</b>
Lease
Property Tax Records
Home Repair, Home Improvement Receipts
<b>Insurance Records</b>
Original Insurance Policies
List of Insurance Premium Amounts & Due Dates
Medical Info. (Prescriptions & Health History)
Claim Reports
<b>Investment Records</b>
Records of Stock, Bond, and Mutual Fund Purchases and Sales
List of Investment Certificate Numbers
Brokerage Statements
Past Income tax Returns and Documentation
<b>Financial Service Records</b>
Checkbook, Unused Checks
Bank Statement, Cancel Checks
Savings Statements
Location Information & number of Safety Deposit Box
<b>Credit Records</b>
Unused Credit Cards
Payment Books
Receipts, Monthly Statements
List of Credit Account #'s and Telephone #'s of Issues
<b>Consumer Purchase &amp; Automobile Records</b>
Warranties
Receipts for Major Purchases
Owners Manual's for Major Appliances
<b>Estate Planning and Retirement Records</b>
Will
Pension Plan Info
IRA Statement
Social Security Info
Trust Agreement