

Financial Records

Personal & Employment Records

Current Resume

Employment Benefit Information

Social Security Numbers

Birth Certificates

Money Management Records

Current Budget

Recent Personal Financial Statements

List of Financial Goals

List of Safety Deposit Box Contents

Tax Records

Pay Stubs, W-2 forms, 1099 forms

Receipts for Tax Deductible Items

Records of Taxable Income

Past Income tax Returns and Documentation

Financial Service Records

Checkbook, Unused Checks

Bank Statement, Cancel Checks

Savings Statements

Location Information & number of
Safety Deposit Box

Credit Records

Unused Credit Cards

Payment Books

Receipts, Monthly Statements

List of Credit Account #'s and Telephone #'s of
Issues

Consumer Purchase & Automobile Records

Warranties

Receipts for Major Purchases

Owners Manual's for Major Appliances

Auto Service Records, Registration, Owner's Manual

Housing Records

Lease

Property Tax Records

Home Repair, Home Improvement Receipts

Insurance Records

Original Insurance Policies

List of Insurance Premium Amounts & Due Dates

Medical Info. (Prescriptions & Health History)

Claim Reports

Investment Records

Records of Stock, Bond, and Mutual Fund Purchases and Sales

List of Investment Certificate Numbers

Brokerage Statements

Dividend Records

Estate Planning and Retirement Records

Will

Pension Plan Info

IRA Statement

Social Security Info.y

Trust Agreement