Financial Checklist

Gather...

- ☐ Income Tax Returns
- ☐ Property Tax Statement
- ☐ Employment Records and Benefits (Vacation Pay, Final Wages, Medical Reimbursement) ☐ Bank Statements (Savings, Checking, MM, CD's)
- ☐ Loan Statements (Credit Card, Personal, Student, HELOC, Mortgage, Auto)
- ☐ Investment Account Statements (IRA's, Brokerage Accounts, Stocks, Bonds)
- ☐ Pension Plan Information
- ☐ Retirement Account Statements
- ☐ Children's Bank Account Statements (Savings, 529's, bonds)
- ☐ Wills, Codicils, and Trust Agreements
- ☐ Social Security Statements
- ☐ Insurance Policies (Health, Life, Disability, LTCi)
- ☐ Personal Property (Boats, Cars, Pets, Jewelry, etc.)
- ☐ Child Care
- ☐ Prenuptial Agreement
- ☐ Power of Attorney
- ☐ Advanced Health Directive
- ☐ Death Certificate
- ☐ Business, Partnership, and Investment Documents
- ☐ Subscription Information (Netflix, Hulu, Amazon Prime, etc.)
- ☐ Burial or Funeral Arrangements
- ☐ Safe Deposit Box
- ☐ Other - Union, Fraternal Organizations, Veterans Association

If you are the surviving spouse, remember to...

- Change passwords for accounts you will be taking over or that were shared
- Make any name or address changes
- Change all beneficiaries
- Update your will
- Notify family, close friends, business associates, and centers of Influence (Attorney, Financial Advisor, CPA, Insurance Agents)

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