Peace of Mind Checklist

Organize your important documents for your loved ones to easily locate.

ENCORE FINANCIAL GROUP

Your goals, our mission.

Your Name:
Your Address:

If you need help completing this checklist, please let us know. You should also consult your attorney and/or certified public accountant regarding any legal and tax matters and documentation.

Important Contacts	Name	Phone Number
Financial Professional		
CPA/Accountant		
Insurance Agent		
Attorney		
Executor of Estate		
Physician		
Other:		

	Emergency Papers and/or Information	Location
✓	**General Items**	
	Birth Certificate	
	Social Security Card	
	Passport/Citizenship	
	Driver License	
	Adoption Papers	
	Marriage Certificate	
	Pre-nuptial Agreement	
	Divorce or Separation Papers	
	Safe and combination	
	Safe Deposit box(es)- keys and box number	
	Trust Documents/Agreements	
	Other:	

	Emergency Papers/Information	Location	Contact Name & Phone
✓	**Emergency Documents**		
	List of Medications/Medical History		
	Advanced Medical Directive/Living Will		
	Durable Power of Attorney		
	Financial Institution's Proprietary Power of Attorney forms (Some financial institutions may refuse to accept a standard POA)		
	Other:		

Emergency Papers/Information	Location	Account Number
✓ **Investment Documents**		
Brokerage Account Statements		
Mutual Fund Account Statements		
Annuity Account Statements		
IRA Plan Statements		
Company Retirement Statements (401(k), etc.)		
Other Company Benefits (i.e.-deferred compensation)		
Stock Certificates Not Held in an Account		
Bearer Bonds Not Held in an Account		
Alternative Investment Documents		
Investment Club Documents/Records		
529 College Savings Plan Statements		
Online Securities Access Information		
Beneficiary Forms for IRAs, 401(k)s, etc.		
Documents Showing Cost Basis of Securities Owned or Sold		
Other:		
✓ **Insurance Documents**		
Mortgage Insurance Policy		
Travel Insurance Policy		
Property & Casualty Policy		
Veterans Administration Insurance		
Health Insurance Policy		
Long-Term Care Insurance Policy		
Disability Insurance Policy		
Beneficiary Forms for Policies		
Other:		
✓ **Bank/Credit Documents**		
Checking Account Statements		
Money Market Account Statements		
Savings Accounts		
Checks/Checkbook		
Credit Union Account Statements		
Life Insurance Policy Documents		
Other:		

Paperwork for Final Arrangements	Location
✓ **Personal Financial Documents**	
Appraisals for Valuable Items	
Inventory of Valuable Items	
Buy/Sell or Partnership Agreements	
Federal/State Gift-Tax Returns	
Prior Years' Tax Returns	
Motor Vehicles Titles and/or Registration	
Lawsuit or Pending Legal Actions	
Promissory Notes	
Outstanding Loans	
Mortgage Documents	
Medical Bills/Records, Prescription Card	
Property and School Tax Records	
Real Estate Deeds/Other Titles	
Rental and/or Lease Agreements	

Paperwork for Final Arrangements	Location	Contact Name & Phone
Last Will & Testament For ease of access, store in either a lawyer's will safe or a fireproof safe at home.		
Military Discharge Papers Veterans receive a small stipend toward burial expenses.		
Burial Instructions		
Cemetery Plot Deed		
Pre-paid Cremation Documents		
Funeral Home Preference		
Charitable Donation Preference		
Letter of Instruction to Executor		
County Surrogate Court The county court/clerk's office of residence oversees estate matters and probate. Executor must obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.		
Information for Obituaries		
Other:		
Other:		
Other:		
Other:		

Notes

Notes

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