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**Personal Financial Records Checklist for:** \_\_\_\_\_

Item	Date Reviewed					Location
Birth Certificates						
Marriage Certificate						
Living Will						
Latest Wills and/or Trust						
Divorce Decrees						
Social Security Records						
Medical Records						
Life Insurance Policies						
Property & Casualty Policies						
Passports						
Death Certificates						
Stocks/Bonds/Mutual Funds/ Statements/Certificates						
Notes Receivable						
Deeds or Lease						
Inventory of Household Goods						
Mortgages						
Professional Licenses						
Credit Card Listing						

<b>Item</b>	<b>Date Reviewed</b>					<b>Location</b>
Investment Records						
Net Worth Statement						
Receipts from all capital improvements to home/property						
Bank Books & Records						
Pension Records						
Employee Benefits Recovered						
Automobile Info						
Recreational Vehicle Info						
Income Tax Returns (last 7yrs.)						
Cemetery Deeds						
Burial Instructions						
Password for Document Storage						
Safe Deposit Box Number						
Lawyer						
Financial Advisors						
Person to call - telephone #						
Other Documents						