# Peace of Mind Checklist

This Peace of Mind Checklist is a simple tool for organizing the vital documents of your life. You are encouraged to share this checklist with your close family members, as well as your financial professional, attorney, account, and your executor. This may be one of the easiest, but most valuable gifts you can give yourself and your family.

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 | | |

| | Emergency papers and/or Information | Location |
|---|---|---|
| √ | *General Items* | |
| | Birth Certificate | |
| | Social Security Card | |
| | Passport/Citizenship (naturalization papers) | |
| | Driver's License number and expiration date | |
| | Adoption papers | |
| | Marriage certificate | |
| | Pre-nuptial agreement | |
| | Divorce or separation papers | |
| | Safe deposit box(es) and keys | |
| | Safe and combination | |
| √ | *Investment Documents* | |
| | Brokerage account statements | |
| | Mutual fund account statements | |
| | Annuity account statements | |
| | Individual retirement plan statements | |
| | Company retirement plan statements | |
| | Other company benefits (e.g. deferred compensation) | |
| | Stock certificates no held in an account | |
| | Bearer bonds not held in an account | |
| | Alternative investment documents (including K-1s) | |
| | Investment club documents/records | |
| | 529 college savings plan statements | |
| | On-line securities access information | |
| | Beneficiary Forms for IRAs, 401(k)s, etc. | |
| | Documents showing cost basis of securities | |

| | Emergency papers or Information | Location |
|---|---|---|
| √ | *Insurance Documents* | |
| | Life insurance policy documents | |
| | Group life policies | |
| | Health and accident insurance ID cards | |
| | Mortgage insurance policy | |
| | Travel insurance policy | |
| | Property and casualty policy documentation | |
| | Veterans administration insurance papers | |
| | Beneficiary forms for insurance/annuity policy | |
| | Long term care insurance policy | |
| √ | *Personal Financial documents* | |
| | Appraisals for valuable items | |
| | Inventory of valuable items | |
| | Buy/sell or partnership agreements | |
| | Deferred compensation agreements | |
| | Federal/state gift-tax returns | |
| | Prior years' tax return | |
| | Motor vehicle title and/or registration papers | |
| | Lawsuit documents on pending legal actions | |
| | Promissory notes | |
| | Outstanding loans | |
| | Mortgage documents | |
| | Medical bills/records, prescription plan card | |
| | Property and school tax records | |
| | Real Estate deeds and/or titles or ownership | |
| | Rental and/or lease agreements | |
| | Trust documents/agreements | |
| √ | *Bank/Credit Documents* | |
| | Checking/money market account statements | |
| | Checks | |
| | Savings account | |
| | Credit cards and account statements | |
| | Credit union account books or statements | |
| √ | Emergency Documents | |
| | Living Will/Health Care Proxy | |
| | Durable Power of Attorney | |
| | Financial institution's proprietary Power of Attorney forms *(some financial institutions may refuse to accept a standard Power of Attorney)* | |

| √ | Paperwork for Final Arrangements | |
|---|---|---|
| | Last Will and Testament<br>*Wills should not be kept in a safe deposit box. Rather, wills should be stored in either a lawyer's will safe or a fireproof safe at your home.* | |
| | Military discharge papers<br>*Veterans receive a small stipend toward burial expenses.* | |
| | Burial instructions | |
| | Cemetery plot deed | |
| | Pre-paid cremation documents | |
| | Funeral home preference and information | |
| | Charitable donations preference(s) | |
| | Letter of instruction (if available) from the deceased to the executor | |
| | Death certificate | |
| | Phone number/address of County Surrogate Court<br>*The county court or clerk's office where the decedent resided will handle/oversee estate matters and probate. The executor must obtain a sufficient number of death certificates for transferring ownership of accounts titles, etc.* | |
| | Information for obituaries (resume/life story/biography, etc.) | |

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