Risk & Insurance | Employee Benefits | Retirement & Private Wealth

FINANCIAL BUILDING BLOCKS BY HUB

Estate Planning

Personal Information and Documents Checklist

No matter how young or old you are, getting your business affairs and records organized is an essential part of financial planning. However, there can be many accounts, policies, documents, and other information to organize. Just thinking about what you need to put together can quickly become overwhelming. Use this checklist as a guide to start organizing your personal information and important documents into a master file. You'll feel good about completing the task — and your family will thank you for it!

Insurance Policies

- ☐ Life and health Insurance
- ☐ Home and auto insurance
- ☐ Other Insurance policies (theft, fire, earthquake, etc.)

Bank Accounts

- ☐ Checking, savings and money market accounts
- ☐ Certificates of deposit (CDs)
- ☐ Debit cards

Credit Cards

- ☐ Card number and expiration date
- ☐ Recent account statements
- ☐ Login and password information for online account management

Mortgages, Loans or Rental Agreements

- ☐ Company through which mortgage or loan was given
- ☐ A copy of the mortgage or loan agreement

Tax Returns

- ☐ Most recent W-2 forms or federal self-employment tax return
- ☐ Income tax returns for the current and previous year, including 1040 variations and 1099s, if applicable

Pension Plans And Retirement Benefit Information

- ☐ 401(k) or 403(b) plans
- ☐ IRAs or Roth IRAs
- ☐ Other

Titles Or Deeds To Any Property

- ☐ Real estate
- ☐ Motor vehicles
- ☐ Boats

Investment Portfolios

- ☐ Stocks, Bonds or Mutual Funds
- ☐ Other

Will (if you already have one)

- ☐ Copy of the Will
- ☐ Copies of previous versions of the Will
- ☐ Name of attorney or law firm that helped create the Will, if applicable

Trusts (if you already have one)

- ☐ Declarations of Trust or trust agreements
- ☐ Name of attorney or law firm that helped create the Trust, if applicable
- ☐ Bank accounts associated with the Trust

Power Of Attorney

- ☐ Name of the person appointed to Power Of Attorney
- ☐ Power Of Attorney documentation
- ☐ Name of attorney or law firm that helped create the POA, if applicable

Safe Deposit Box

- ☐ Location of safe deposit box, including keys or location of keys

Any Professionals Who Have Helped

- ☐ Lawyer, accountant, insurance agent
- ☐ Other

Advance Directive

- ☐ Living Will
- ☐ Health Care Proxy
- ☐ Do Not Resuscitate (DNR)

Proof Of Identity And Relationships

- ☐ Social Security card
- ☐ Armed Forces discharge papers
- ☐ Birth certificate
- ☐ Death certificate
- ☐ Marriage certificates
- ☐ Divorce certificates
- ☐ Prenuptial agreements
- ☐ Divorce settlements

Household Utilities

- ☐ Electricity
- ☐ Gas
- ☐ Water
- ☐ Phone
- ☐ Cable
- ☐ Internet

Automatically Renewing Medications

- ☐ Names of medications
- ☐ Name of pharmacy where medications are renewed
- ☐ Name of doctor who prescribed medication

Email/Social media

- ☐ List accounts and log-in information (Gmail, Twitter, Facebook, LinkedIn, Instagram, etc.)

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