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*Please check mark all documents as you compile them for review.*

**BANK ASSETS & INVESTMENTS STATEMENTS**

- SAVINGS & CHECKINGS
- INVESTMENT STATEMENTS
- EMPLOYER STOCK OPTIONS & PURCHASE PLAN AGREEMENTS
- PRIVATELY HELD STOCK & BUSINESSES
- OTHER COLLECTIBLES, VALUABLES, OR PERSONAL ASSETS

**INSURANCE & ANNUITY STATEMENTS**

- LIFE INSURANCE POLICIES
- ANNUITY STATEMENTS
- DISABILITY POLICIES
- LONG-TERM CARE COVERAGE & POLICY
- LIFE INSURANCE TRUST/LEGACY PLAN

**RETIREMENT ASSETS DOCUMENTS**

- EMPLOYER 401(K)/403(B)/TSP STATEMENTS
- SEP IRA/SIMPLE IRA STATEMENTS
- IRA/ROTH IRA STATEMENTS
- COMPANY PENSION PLAN STATEMENTS
- SOCIAL SECURITY BENEFIT & EARNINGS STATEMENT

**ESTATE PLANNING DOCUMENTS**

- FAMILY TREE – LIST OF BENEFICIARIES
- SUMMARY OF WILL
- LIVING WILL
- DURABLE POWERS OF ATTORNEY
- HEALTH CARE PROXIES

**LIABILITY DOCUMENTS**

- MORTGAGE STATEMENTS
- STUDENT LOANS
- CAR LOANS
- OTHER LOAN DOCUMENTS

**TAX DOCUMENTS**

- TAX RETURNS
- W2 & A RECENT PAY STUB
- ESTIMATED TAX PAYMENTS
- CPA