

BUSINESS/FINANCES

FINANCIAL PAPERS CHECKLIST

- Financial statement listing assets and liabilities **along with financial statements, certificates and appraisals**
- Assets:
- Cash and checking account balance
 - Accounts Receivable
 - CD's and Savings Accounts
 - Post tax balances
 - Pre tax balances
 - Real estate
 - Life insurance cash value
 - Vehicles
 - Antiques and Collectibles
 - Personal property
 - _____
 - _____
- Liabilities:
- Real estate
 - Vehicle loans
 - Accounts payable
 - _____
 - _____
- Pension benefit statement
- Social Security card
- Social Security benefit statement
- Copy of driver's license
- Birth certificate
- Insurance files (disability, health, life, home, auto, liability, etc.)
- Passport or photo ID
- Copies of credit cards (front and back)
- Contact information for bank, financial planner, insurance agent and employer
- User names and passwords for all websites you visit (prescriptions, financial websites, etc.)
- Wills, living wills, trusts, etc.
- Marriage certificate, deeds, diplomas, divorce papers, citizenship papers, etc.
- Inventory listing and photos of real and personal property
- Tip: Consider putting this information on a thumb drive and you keep on your key chain*
- Contact information for utilities, cable, phone, water, etc.
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