



Getting Financially Organized Checklist

Gather Statements and other Documents Pertaining To:

● INSURANCE

- Life Insurance
- Homeowners Insurance
- Health Insurance
- Auto Insurance

● BANK ACCOUNTS

- Checking Accounts
- Savings Accounts
- Mortgage Information

● CREDIT CARDS

- American Express
- MasterCard
- VISA
- Other Specific Cards

● INVESTMENTS AND PENSIONS

- Investment Accounts
- 401(k) or 403(b) Plans
- IRAs
- Employer Pension
- Social Security

● PROPERTY DEEDS AND TITLES

- Real Estate
- Automobiles
- Boats or other RVs

● USER NAMES AND PASSWORDS

- Computer
- Mobile Phone
- Home Security
- On-Line Accounts
- Social Media Accounts
- Frequent Flier Accounts

● MISCELLANEOUS

- Safe deposit box or key to safe
- Prior military status
- Burial plan
- Specific instructions in the trust
- Organ donation
- Birth certificate
- Wedding license
- Divorce decree
- Voter information
- Fraternal or religious group member