

Good record keeping is a key component of sound financial management. Please gather the following documents. We will review these documents with you during your initial planning meeting.

| Document | Account Number | Location |
|-------------------------------|----------------|----------|
| Birth Certificates | | |
| Marriage Certificate | | |
| Children's Birth Certificates | | |
| Social Security Card | | |
| Divorce Decree | | |
| Passport | | |
| Legal Documents | | |
| *Financial Power of Attorney | | |
| *Healthcare Power of Attorney | | |
| *Living Will | | |
| *Will/Trust Documents | | |
| Insurance Policies | | |
| *Life | | |
| *Health | | |
| *Disability | | |
| *Homeowner's/Renter's | | |
| *Automobile | | |
| Employee Benefit Data | | |
| *Group Insurance | | |
| *Pension Plan | | |
| *Profit-Sharing Plan | | |
| *401(k), 403(b) | | |
| Other | | |
| Banking Records | | |
| *Checking Account Balance | | |
| *Savings Account Balance | | |
| *Money Market Account Balance | | |
| *Checking Statements | | |
| *Certificates of Deposit (CD) | | |
| *Safe Deposit Box | | |
| Investment Records | | |
| *Investment Statements | | |
| *IRA/ROTH IRA Statements | | |
| *Annuity Statements | | |
| *Stock/Bond Certificates | | |
| Income Tax Records | | |
| *Most Recent Tax Return | | |
| Housing Records | | |
| Improvements | | |
| *Property Tax Payments | | |
| *Mortgage/Rental Statements | | |
| Appliance Warranties | | |
| *Credit/Charge Cards | | |
| *Consumer Debt | | |
| Other | | |

*Please provide these items at your initial planning meeting.

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