

# Key Financial Documents

List the location of applicable items along with any associated online passwords:

Birth certificate(s)

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Adoption papers

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Marriage license/certificate

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Divorce decree

---

Citizenship papers

---

Social security cards

---

Military service records

---

G.I. insurance papers

---

Employee benefit plan information

---

Insurance Policies

---

Life

---

Health care

---

Long Term Care

---

Disability

---

Auto

---

Homeowner's/renter/s

---

Umbrella

---

Type

---

Location

---

Mortgage/real estate documents

---

Auto title(s)

---

Property title(s)/deed(s)

---

Safe deposit box

---

Box #

---

Location of key

---

People who have access

---

Stock/bond certificates

---

Bank accounts

---

Investment accounts

---

Retirement accounts

---

529 savings plans

---

Will(s)/trust documents

---

Power of Attorney - health care

---

Power of Attorney - property

---

Cemetery plot title(s)

---

Tax records

---

Business formation documents

---

Loan documents

---

Type of loan

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Location

---

## Other documents

Type

---

Location

---

Professional Advisors (attorney, financial advisor, accountant, insurance agent, etc.)

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Name

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Contact information

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