Kowal
Financial Advisors

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Financial Checklist

This checklist will help you organize your affairs to assist with your planning. It is also helpful to have these documents all in one place for your spouse or heirs in the event of incapacity or if you pass away. Gathering these documents, can save a lot of time, aggravation, and effort when the information is needed.

Financial Accounts

- ☐ Retirement Plan Statements (401k, TSP, 403B, IRA, Pension)
- ☐ Bank Accounts
- ☐ Credit Card Information (accounts)/Unsecured Loans
- ☐ Cryptocurrency
- ☐ Investment Statements
- ☐ Advisor/Broker Contact Information
- ☐ Beneficiaries for All Accounts

Estate Planning

- ☐ Wills
- ☐ Trusts
- ☐ Durable Power of Attorney
- ☐ Advance Medical Directive
- ☐ Attorney Contact Information
- ☐ Burial Wishes, Funeral Home Information
- ☐ Safe Deposit Contents /Information
- ☐ Title to Burial Plot
- ☐ Valuables Inventory and Letter of Instruction
- ☐ Pet Information
- ☐ Prenuptial Agreement
- ☐ Caregiver Information
- ☐ Password Information

Insurance/Healthcare

- ☐ Auto Insurance
- ☐ Dental Insurance Plan
- ☐ Disability Insurance
- ☐ Health Insurance Plan
- ☐ Life Insurance Policies
- ☐ Long term Care Policies
- ☐ Medicare Supplement Policy

(over, please)

Insurance/Healthcare *(continued)*

- [ ] Primary Physician/Specialists
- [ ] Veterinarian
- [ ] Medications
- [ ] Flood Insurance
- [ ] Homeowners Insurance
- [ ] Rental Insurance
- [ ] Title Insurance
- [ ] Umbrella Policy

Personal Documents

- [ ] Birth Certificates
- [ ] Divorce Papers
- [ ] Marriage License
- [ ] Adoption Papers for Children
- [ ] Church Information
- [ ] Citizenship Papers/Passport
- [ ] Last 3 Years Tax Returns
- [ ] Military Discharge Papers
- [ ] Social Security Cards
- [ ] Veteran Information/Service Number

Property

- [ ] Alarm/Security
- [ ] Electric Company
- [ ] Gas company
- [ ] House Cleaning
- [ ] Pest Control
- [ ] Swimming Pool/Hot Tub Maintenance
- [ ] Telephone/Cable Company
- [ ] Trash Pickup
- [ ] Yard Maintenance
- [ ] Lease Contracts (car, furniture, appliances, etc.)
- [ ] Vehicle Titles
- [ ] Car Registration
- [ ] Deeds and Titles
- [ ] Leases, as Landlord or Tenant
- [ ] Mortgage – Primary Residence/Second/Line Of Credit
- [ ] HOA