

Always Prepared THE BINDER

IMPORTANT INFORMATION
Checklist of what you need on hand

IMPORTANT DOCUMENTS

- Birth Certificate
- Computer and e-mail passwords
- Social Security Number
- Basic financial information

INCOME TAX DOCUMENTS

- Prior 3 years income tax returns
- Current Partnership/Corporate tax returns
- Gift tax returns, if any were filed

LEGAL AGREEMENTS

- Marriage Certificate/License
- Divorce records/decrees
- Prenuptial/postnuptial agreements
- Partnership/Buy-sell agreements

RETIREMENT PLAN/INVESTMENTS

- Plan summaries (IRA, 401(k), stock options) and beneficiaries
- Investment accounts

TESTAMENTARY DOCUMENTATION

- Will
- Trusts and any amendments
- Name, address, and age of each person named in the will or trust, including people excluded or disinherited

OTHER

-
-

INVESTMENTS

ADULT PROVIDER:
ACCOUNT NUMBER:
MAILING ADDRESS:
AGENT:
PHONE NUMBER:

IRA PROVIDER:
POLICY NUMBER:
MAILING ADDRESS:
AGENT:
PHONE NUMBER:

HOMEOWNERS
POLICY NUMBER:
MAILING ADDRESS:
AGENT:
PHONE NUMBER:

OTHER PROVIDER:
POLICY NUMBER:
MAILING ADDRESS:
AGENT:
PHONE NUMBER:

Charity: _____
Special requests: _____

INVESTMENTS

AGREEMENTS

BER ME
l services

THIRTYHANDMADE DAYS.COM