

THE *Always Prepared* **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
401 K 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: _____

BERMUDA SERVICES

AGREEMENTS

Charity: _____
Special requests: _____

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