

# 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: \_\_\_\_\_

**BERME**  
*Services*

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**AGREEMENTS**

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Charity: \_\_\_\_\_

Special requests: \_\_\_\_\_

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