

Estate Planning

	Yes	No
Will	<input type="checkbox"/>	<input type="checkbox"/>
Trust	<input type="checkbox"/>	<input type="checkbox"/>
Financial Power of Attorney	<input type="checkbox"/>	<input type="checkbox"/>
Health Power of Attorney	<input type="checkbox"/>	<input type="checkbox"/>
Contracts for arrangements	<input type="checkbox"/>	<input type="checkbox"/>
Pre-paid fees for arrangements	<input type="checkbox"/>	<input type="checkbox"/>
Retirement Documents 401k, TSP, ETC.	<input type="checkbox"/>	<input type="checkbox"/>

Immediate needs

Checking Account	<input type="checkbox"/>	<input type="checkbox"/>
Savings Account	<input type="checkbox"/>	<input type="checkbox"/>
Certificate of Deposits	<input type="checkbox"/>	<input type="checkbox"/>
Money Market Accounts	<input type="checkbox"/>	<input type="checkbox"/>
Copies of credit cards and reports	<input type="checkbox"/>	<input type="checkbox"/>
Credit Score	<input type="checkbox"/>	<input type="checkbox"/>

Important Personal Document

Birth Certificate	<input type="checkbox"/>	<input type="checkbox"/>
Adoption Certificate	<input type="checkbox"/>	<input type="checkbox"/>
Citizenship/Green Card	<input type="checkbox"/>	<input type="checkbox"/>
Copy of Drivers's License	<input type="checkbox"/>	<input type="checkbox"/>
Copy of Car Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Passport	<input type="checkbox"/>	<input type="checkbox"/>
Military Records	<input type="checkbox"/>	<input type="checkbox"/>
Prenuptial Agreement	<input type="checkbox"/>	<input type="checkbox"/>
Marriage License	<input type="checkbox"/>	<input type="checkbox"/>
Cohabitation Agreement	<input type="checkbox"/>	<input type="checkbox"/>
Domestic Partner Registration	<input type="checkbox"/>	<input type="checkbox"/>
Divorce Decree	<input type="checkbox"/>	<input type="checkbox"/>
Titles to cars, boats, motor cycles	<input type="checkbox"/>	<input type="checkbox"/>
Jelwery/Valuable Appraisals	<input type="checkbox"/>	<input type="checkbox"/>
Social Security Card & Statements	<input type="checkbox"/>	<input type="checkbox"/>
Death Certificates	<input type="checkbox"/>	<input type="checkbox"/>

Insurance Protection

Health Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Property and Casualty (home,car,boat)	<input type="checkbox"/>	<input type="checkbox"/>
Life Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Long Term Care	<input type="checkbox"/>	<input type="checkbox"/>
Income Protection (Disability)	<input type="checkbox"/>	<input type="checkbox"/>
Fire Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Flood Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Umbrella Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Insurance Score	<input type="checkbox"/>	<input type="checkbox"/>

Housing

Renting	<input type="checkbox"/>	<input type="checkbox"/>
Buying	<input type="checkbox"/>	<input type="checkbox"/>
Home Owners Association (HOA)	<input type="checkbox"/>	<input type="checkbox"/>
Deeds	<input type="checkbox"/>	<input type="checkbox"/>
Promissary Notes	<input type="checkbox"/>	<input type="checkbox"/>
Copy of Survey	<input type="checkbox"/>	<input type="checkbox"/>
Copy of Title	<input type="checkbox"/>	<input type="checkbox"/>

Wealth Accumulation

Stocks	<input type="checkbox"/>	<input type="checkbox"/>
Bond	<input type="checkbox"/>	<input type="checkbox"/>
Business Ownership	<input type="checkbox"/>	<input type="checkbox"/>
Treasury Notes	<input type="checkbox"/>	<input type="checkbox"/>
Annuity Contracts	<input type="checkbox"/>	<input type="checkbox"/>
Assets	<input type="checkbox"/>	<input type="checkbox"/>
Copy of all Investment Papers	<input type="checkbox"/>	<input type="checkbox"/>