

## DOCUMENT CHECKLIST

| DOCUMENT                        | LOCATION |
|---------------------------------|----------|
| Birth certificate               |          |
| Marriage license                |          |
| Pre/post nuptial agreement      |          |
| Will                            |          |
| Trust(s)                        |          |
| Living will / Power of attorney |          |
| Mortgage papers                 |          |
| Automobile title/papers         |          |
| Income tax returns              |          |
| Gift tax returns                |          |
| Insurance policies              |          |
| Employee benefit documents      |          |
| Passport                        |          |
| Military records                |          |
| Medical records                 |          |
| Warranties                      |          |
| Current bills                   |          |
| Funeral / burial documents      |          |
| Other:                          |          |