



*“A man doesn’t plant a tree  
for himself. He plants it for  
his posterity.”*

Alexander Smith

# *Peace of Mind*

## Checklist

If you are like most of us, your life has been recorded through a series of important legal documents. When major life events occur it can be difficult to find critical items. Organizing those items properly is a very wise use of your time.

In today’s busy world, our lives are constantly changing. As we transition through life’s experiences – changing jobs, buying a home, planning for retirement or experiencing a death in the family – we come to value the organization of our important documents. Unexpected circumstances can be stressful enough without the added worry of quickly locating the required documentation.

We created this *Peace of Mind Checklist*, along with *My Wishes Record Keeper*, to be a simple tool for organizing the vital documents of your life. We encourage you to share this checklist with your close family members, as well as your financial professional, attorney, accountant, and your executor. This may be one of the easiest, but most valuable gifts you can provide yourself and your family.



**ENCORE FINANCIAL GROUP**

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For assistance or additional information please call our office at:  
231.627.1023

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Your Name:

Your Address:

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If you need help completing this checklist, please let us know. You should also consult your attorney and/or certified public accountant regarding any legal and tax matters and documentation.

✓	Important Contacts	Name	Phone Number
	Financial Professional		
	CPA/Accountant		
	Insurance Agent		
	Attorney		
	Executor of Estate		
	Physician		
	Other:		

	Emergency Papers and/or Information	Location
✓	<b>General Items</b>	
	Birth Certificate	
	Social Security Card	
	Passport/Citizenship	
	Driver License	
	Adoption Papers	
	Marriage Certificate	
	Pre-nuptial Agreement	
	Divorce or Separation Papers	
	Safe and combination	
	Safe Deposit box(es)- keys and box number	
	Trust Documents/Agreements	
	Other:	

	Emergency Papers/Information	Location	Contact Name & Phone
✓	<b>Emergency Documents</b>		
	List of Medications/Medical History		
	Advanced Medical Directive/Living Will		
	Durable Power of Attorney		
	Financial Institution's Proprietary Power of Attorney forms <i>(Some financial institutions may refuse to accept a standard POA)</i>		
	Other:		

	<b>Emergency Papers/Information</b>	<b>Location</b>	<b>Account Number</b>
✓	<b><i>Investment Documents</i></b>		
	Brokerage Account Statements		
	Mutual Fund Account Statements		
	Annuity Account Statements		
	IRA Plan Statements		
	Company Retirement Statements		
	Other Company Benefits		
	Stock Certificates Not Held in an Account		
	Bearer Bonds Not Held in an Account		
	Alternative Investment Documents		
	Investment Club Documents/Records		
	529 College Savings Plan Statements		
	Online Securities Access Information		
	Beneficiary Forms for IRAs, 401(k)s, etc.		
	Documents Showing Cost Basis of Securities Owned or Sold		
	Other:		
✓	<b><i>Insurance Documents</i></b>		
	Mortgage Insurance Policy		
	Travel Insurance Policy		
	Property & Casualty Policy		
	Veterans Administration Insurance		
	Health Insurance Policy		
	Long-Term Care Insurance Policy		
	Disability Insurance Policy		
	Beneficiary Forms for Policies		
	Other:		
✓	<b><i>Bank/Credit Documents</i></b>		
	Checking Account Statements		
	Money Market Account Statements		
	Savings Accounts		
	Checks/Checkbook		
	Credit Union Account Statements		
	Life Insurance Policy Documents		
	Other:		

	Paperwork for Final Arrangements	Location
✓	<b>Personal Financial Documents</b>	
	Appraisals for Valuable Items	
	Inventory of Valuable Items	
	Buy/Sell or Partnership Agreements	
	Federal/State Gift-Tax Returns	
	Prior Years' Tax Returns	
	Motor Vehicles Titles and/or Registration	
	Lawsuit or Pending Legal Actions	
	Promissory Notes	
	Outstanding Loans	
	Mortgage Documents	
	Medical Bills/Records, Prescription Card	
	Property and School Tax Records	
	Real Estate Deeds/Other Titles	
	Rental and/or Lease Agreements	

✓	Paperwork for Final Arrangements	Location	Contact Name & Phone
	Last Will & Testament <i>For ease of access, store in either a lawyer's will safe or a fireproof safe at home.</i>		
	Military Discharge Papers <i>Veterans receive a small stipend toward burial expenses.</i>		
	Burial Instructions		
	Cemetery Plot Deed		
	Pre-paid Cremation Documents		
	Funeral Home Preference		
	Charitable Donation Preference		
	Letter of Instruction to Executor		
	County Surrogate Court <i>The county court/clerk's office of residence oversees estate matters and probate. Executor must obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.</i>		
	Information for Obituaries		
	Other:		

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