Worksheet 4.1

Locate Important Documents

Use this worksheet for help locate the documents you will need in meeting with professional advisers. It is important to gather certain documents to assess your current financial situation, but also to determine ownership and obligations related to your real and personal property. Doing this exercise prior to meeting with professionals will save time, money, and will help them better serve your needs.

DOCUMENT	WHERE IS IT?
Birth Certificates (all family members)	
Marriage Certificates	
Divorce decrees/separation	
Medical Records	
Healthcare Power of Attorney and Living Will	
Durable Power of Attorney	
Bequest list of tangible personal property	
Wills and Trust documents	
Cemetery deeds/burial instructions	
List of special bequests (to heirs, charity, etc.)	
Insurance policies	
Stocks, mutual fund and bond certificates	
Real estate deeds	
Promissory notes, contracts, mortgages, receivables	
Partnership/corporation documents	
Checking/savings account statements	
Pension statements	
Income/gift tax returns	
Farm and other business financial statements	
Property tax statements	
Farm conservation contracts (NRCS, etc.)	
Forestry Management Plan	