

# IMPORTANT PAPERS CHECKLIST

It is strongly recommended that this document be password protected if it is kept in digital format. If it is printed off, it is strongly recommended that it is kept in a fireproof, locked safe. If this information gets into the wrong hands, it could cause serious financial and emotional damage to everyone involved. By filling out this document, you agree to hold Althaus Law LLC harmless for any and all damages incurred, if any should arise.

## ESTATE PLANNING DOCUMENTS

	Location	Information
Will		
Trust		
Financial Power of Attorney		
Medical Power of Attorney		

## INSURANCE POLICIES

	Location	Information
Health		
Life		
Long Term Care		
Accident		
Homeowners		
Auto		
Business		

## PERSONAL PAPERS

	Location	Information
Birth Certificate		
Children's Birth Certificates		
Social Security Cards		
Citizenship Papers		
Adoption Papers		
Divorce Records		
Military Documents		
Safety Deposit Box/Key		
Safe/Combination		

## BANK AND TAX INFORMATION

	Location	Information
Income Tax Returns		
Bank Statements		
Check Book		

## BUSINESS DOCUMENTS

	Location	Information
Incorporation Papers		
Partnership Agreements		

## ASSETS/INVESTMENTS

	Location	Information
Stocks		
Mutual Funds		
Bonds		
Keogh and IRAs		
Annuity Contracts		
Retirement Plans		
Profit Sharing Plans		
Stock-Options		
Other Investments		
Notes/Loans		
Rental Properties		

## DEEDS AND TITLES

	Location	Information
Real Estate		
Motor Vehicles		
Other Personal Property		

## BURIAL DOCUMENTS

	Location	Information
Instructions		
Cemetery Plot Deed		
Burial Insurance		

## OTHERS

	Location	Information

### Contact Us

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