

Financial Checklist for Estate Planning

Please ensure all statements show current values. If you have any questions, please call (920) 993-0990 or (800) 794-5548

- Real Estate**
Most recent tax bill, current deed, and (if applicable) a Certified Survey Map.
- Homeowners Insurance/Umbrella Policy**
Statement showing insurance company, agent, and policy number.
- Bank/Credit Union Account Statements**
Current statement for all accounts. For each institution, note which branch you frequent.

- Life Insurance**
Statements showing owner, insured, company, agent, policy number, Face Value, Cash Value, and Death Benefit.
- Long Term Care Insurance**
Original policy, any modifications, and recent statements.
- Retirement Accounts**
Statements showing owner, custodian, company, and account number.
- Annuities**
Statements showing owner, annuitant(s), company, agent, and contract number.
- Investment Accounts**
Statement showing owner, company, agent, and account number.
- Stock Certificates**
Bring all original stock certificates.
- U.S. Savings Bonds**
Bring any original bonds. Total Number of Bonds: _____
- Business Interests**
 - Sole Proprietorship Most Recent Tax Return, Insurance Policy, Business Bank Statements, Profit & Loss Statement.
 - Partnership: Partnership Agreement, Most Recent Business Tax Return, Insurance Policy, Business Bank Statements, Profit & Loss Statement.
 - Corporation: Corporate Record Book, Buy/Sell Agreement, Articles of Incorporation, Most Recent Business Tax Return, Insurance Policy, Business Bank Statements, Profit & Loss Statement.
 - LLC: LLC Operating Agreement, Articles of Organization, Most Recent Business Tax Return, Insurance Policy, Business Bank Statements, Profit & Loss Statement.