## **Document Checklist**

Presented by: Genyatto Brown, Agency Owner

Prepared for:

| Document                               | Location |
|--|----------|
| Personal:                              |          |
| Birth Certificate                      |          |
| Marriage License                       |          |
| Pre- or Post-Nuptial Agreement         |          |
| Will                                   |          |
| Trust(s)                               |          |
| Living Will(s)/Power(s) of Attorney    |          |
| Mortgage Papers                        |          |
| Automobile Titles/Papers               |          |
| Income Tax Returns                     |          |
| Gift Tax Returns                       |          |
| Insurance Policies                     |          |
| Employee Benefit Documents             |          |
| Passport                               |          |
| Military Records                       |          |
| Medical Records                        |          |
| Citizenship Papers                     |          |
| Warranties                             |          |
| Current Bills                          |          |
| Funeral/Burial Documents               |          |
| Other:                                 |          |
| Business Ownership:                    |          |
| Partnership/Incorporation Documents    |          |
| Buy-Sell Agreement                     |          |
| Section 303 Stock Redemption Agreement |          |
| Business Valuation/Appraisal           |          |
| Business Tax Returns                   |          |
| Other:                                 |          |
|  |          |

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It is recommended that you keep the following documents in a secure location in your home:

- Copies of wills and trusts
- Copies of living wills and powers of attorney
- Income tax returns

These documents are best kept in a **bank safety deposit box**:

- Original wills, trusts and powers of attorney
- Marriage certificates, birth certificates, divorce decrees, death certificates
- Deeds and car titles
- Military discharge papers
- Any stock or bond certificates
- Citizenship papers
- Insurance policies

Consider giving these items to your **attorney**, **executor and/or spouse**:

- Living will/medical power of attorney (original should be given to the agent named in the document)
- Copies of wills, trust agreements, powers of attorney
- Inventory of insurance and investments
- List of professional advisors (attorney, accountant, insurance agent, etc.)
- Safety deposit box access information
- Funeral instructions



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