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Financial Records Checklist

- Names and social security numbers of you and your spouse.
- Place of employment with address, phone, title and details of salary, pension plans, profit-sharing plans, Keogh plans and other details.
- Life insurance of both you and your spouse.
- Property in both your names (joint) as well as in your separate names (separate).
 - Real estate (including income, business or investment property).
 - Stocks, bonds and other securities.
 - Bank and savings accounts.
 - Debts, liens and mortgages against these assets.
- Details of jointly owned family business
Other owners, financial statements, loan applications and income tax returns
- Bank statements
- Income tax returns
- Vehicle registration
- Furniture
- Patents, royalties and copyrights
- Collections, artworks and antiques
- Proceeds of legal cases, such as personal injury cases
- Unusual monies, such as lottery winnings or winning lottery tickets.
- Trust funds, annuities and inheritances
- Career assets - these include seniority experience, education licenses or degrees, benefit packages, stock options, deferred compensation, vacation, sick leave, bonuses, etc.
- Cemetery plot information