

Financial Document Checklist

Everything to gather and store safely — IDs, policies, account statements, estate paperwork — with a place to note where each lives.

Identity & income

- ☐ Birth certificates and Social Security cards
- ☐ Passports and driver's licenses
- ☐ Recent pay stubs (last 2 months)
- ☐ Last two years of tax returns

Accounts & protection

- ☐ Bank and brokerage statements
- ☐ Retirement plan statements
- ☐ Life, health, auto and home policies
- ☐ Beneficiary designations confirmed
- ☐ Mortgage, lease or title documents

Estate basics

- ☐ Will
- ☐ Financial power of attorney
- ☐ Healthcare directive
- ☐ Trust documents, if any
- ☐ List of digital accounts and passwords

Where it lives

DOCUMENT	LOCATION	WHO ELSE KNOWS
1.		
2.		
3.		
4.		
5.		
6.		