

# FINANCIAL RECORDS ORGANIZATION CHECKLIST

We've created this checklist as a guide to help you organize important financial documents to be better prepared to manage affairs after a catastrophe, serious illness, disability or death. Broken out by topic, these are just some examples of how you can organize your binder or file system.

## Insurance

- Health insurance forms:
  - Long term care (LTC)
  - HSA/HRA/FSA
- Property and casualty policies
- Disability and life policies

## Tax Returns

- Tax returns from the last 3 years

## Retirement Specific

- 401(k) account statements
- Pension statements
- Social Security statements and correspondence

## Investments

- Brokerage statements
  - IRA
  - Taxable
  - 529
  - ABLE
- 1099 mailings

## Banking

- Checking account
- Savings account
- Credit card statements and payment history

## Loans

- Mortgages
- Car
- Student loans

## Legal Documents

- Wills
- Trust documents
- Durable power of attorney
- Health care proxy
- Deeds to house/car

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