

Financial Preparation Checklist

Below is a checklist of things your family will need in the event that the unthinkable happens. Make a copy of these documents and keep them in a safe, accessible place. Make sure that the family has open discussions on these topics.

The Name and Phone Number of Attorney, Accountant, Financial Advisor, and On-Post Casualty Assistance

PERSONAL DOCUMENTS

- Birth Certificates
- Adoption Papers
- Citizenship/Naturalization Papers
- Military Discharge Papers
- Current Military Assignment Orders
- Last Will and Testament
- Trust Documents
- Burial Instructions (pre-paid services, plots, etc.)
- Safe Deposit Boxes and/or Safes (with keys and/or combinations)
- Powers of Attorney

FINANCIAL ACCOUNTS

- Bank/Credit Union Accounts (Checking, Savings)
- Retirement Accounts
- Brokerage Accounts
- Pension System Statements
- Deferred Compensation Papers
- Credit Card Accounts
- U.S. Savings Bonds
- Money Market Accounts
- Certificates of Deposit (CDs)
- Stock Certificates/Bonds

FINANCIAL PAPERS

- Real Estate Deeds
- Mortgage Documents
- Property Tax Records
- Inventory of Assets (include appraisal)
- Vehicle Titles
- Income Tax Returns for Several Years
- Rental/Lease Agreements
- Partnership Agreements
- Outstanding Loans (either owed to you or by you)
- Pending Legal Actions/Lawsuits

MEDICAL AND INSURANCE INFORMATION

- Health Care Provider and Personal ID Number
- Organ Donor Information
- Living Will/Health Care Proxy
- Long Term Care Policy Information
- Life Insurance Policy Documents
- Veterans Administration Insurance Policy
- Mortgage Insurance Policy
- Property and Casualty Policies