

# Family Financial Documents

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## Legal

Will for both spouses  
Living Wills  
Trusts  
Home purchase documents (title, mortgage, appraisals)  
Titles to cars and other significant assets  
Adoption, marriage, divorce, death certificates



## Insurance

Life list of policies (numbers, amounts, agent contact info)  
Health  
Home  
Disability  
Auto  
Umbrella

## Funeral

Burial plots contact info for cemetery, funeral home  
Instructions for your final needs  
Outline of funeral services  
Prepaid funeral services  
List of people to notify and contact info  
Draft obituary



## Balance Sheet

Needed for preparing estate documents  
Lists of all bank accounts, numbers, balances  
List of all investments (where, amounts, contact info)  
List of all debts

## Tax Returns

Copies of last 3 - 5 years federal income tax returns  
Copies of W-2s, Form 1099s, Form 1098, Itemized deductions detail  
Real Property tax payments and invoices



## Storage Media

Hard copy (paper). Keep in safe place. Electronic storage media changes every 10 years.  
Soft copy (electronic). Keep encrypted, use passwords, backup frequently