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| <input type="checkbox"/> Advance directive (e.g., living will, personal health directive) | <input type="checkbox"/> Insurance policies  |
| <input type="checkbox"/> Annuity contracts for yourself and other family members          | — Employee benefits statement  |
| <input type="checkbox"/> Automobile registration  | — General insurance (auto, fire, homeowners, casualty)                               |
| <input type="checkbox"/> Bank statements, passwords and passbooks                         | — Health insurance   |
| <input type="checkbox"/> Birth certificates of family members                             | — Life insurance   |
| <input type="checkbox"/> Bonds and securities statements                                  | — Long-term care insurance   |
| <input type="checkbox"/> Brokerage and mutual fund statements                             | — Loan information and paperwork   |
| <input type="checkbox"/> Business agreements  | <input type="checkbox"/> Marriage certificate(s)                                     |
| — Partnerships  | <input type="checkbox"/> Membership cards or dues notices                            |
| — Buy-sell agreements   | <input type="checkbox"/> Medical and disability insurance                            |
| — Tax records   | <input type="checkbox"/> Military discharge papers                                   |
| — Balance sheet   | <input type="checkbox"/> Names and addresses of heirs, next of kin and beneficiaries |
| <input type="checkbox"/> Certificates of appointments                                     | <input type="checkbox"/> Notes receivable  |
| <input type="checkbox"/> Credit card information  | <input type="checkbox"/> Passwords to digital accounts                               |
| <input type="checkbox"/> Disability income insurance                                      | <input type="checkbox"/> Real estate deeds   |
| <input type="checkbox"/> Domestic partner or civil union certificates                     | <input type="checkbox"/> Retirement plans  |
| <input type="checkbox"/> Earnings records   | <input type="checkbox"/> Social Security numbers or cards                            |
| <input type="checkbox"/> Funeral preferences  | <input type="checkbox"/> Stock information   |
| <input type="checkbox"/> General insurance policies                                       | <input type="checkbox"/> Summary of assets   |
| <input type="checkbox"/> Government life insurance policy number                          | <input type="checkbox"/> Trust   |
| <input type="checkbox"/> Income tax returns   | <input type="checkbox"/> Veterans Affairs claim number                               |
| <input type="checkbox"/> Installment payment books  | <input type="checkbox"/> W-2 forms   |
|   | <input type="checkbox"/> Will(s)   |

**Notes:**

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Provided content is for overview and informational purposes only and is not intended as tax, legal, fiduciary, or investment advice.