

# Information Checklist



Document/File/Form/Information/etc.	Got it!	Need it!	Where It's Located
Birth Certificate(s) Adoption Papers			
Marriage License			
Divorce Papers			
Social Security Card(s)			
Naturalization Documents			
Will			
Power(s) of Attorney			
Mortgage or Real Estate Deeds of Trust			
Vehicle Registration/Ownership Papers			
Previous Year's Tax Returns			
Property Tax Statement			
Personal Property Tax (i.e. Car Tax)			
Bank/Credit Union Statements			
Credit/Debit Card Statements			
Retirement Accounts (401 (k), TSP, IRA)			
Investment Accounts (Stocks, Bonds, Mutual Funds)			
Recent Pay Stubs for all Sources of Income			
Government Benefits (e.g. Social Security, etc.)			
Alimony Income			
Child Support Income			
Professional Appraisals of Personal Property			
Rewards Accounts (e.g. Frequent Flyer, etc.)			
Mortgage Statement & Deeds			
Utility Bills (Electric, Water, Gas)			
Car Payment			
Student Loan(s)			
Alimony Payments			
Elder Care Facilities			
Property Insurance			
Rental Insurance			
Auto Insurance			
Life Insurance			
Health Insurance ID Card(s)			
Record of Immunizations/Allergies			
List of Necessary Medications			
Disabilities Documentation			
Living Will			
Dental Records/Child Identity Cards/DNA Swabs			
Current Military ID/Military Discharge DD 2648			

