



Life's transitions create a need for important information in a flash. The personal inventory is a listing of your very important papers. The organization of all paperwork associated with the major aspects of life and transitions can assist in smoother changes. Place this document in a convenient spot and share it's access with individuals responsible for the financial and legal parts of your life ( named executor/executrix, power of attorney, financial professional, attorney, etc).

Key Contacts	Address	Phone
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Financial Professional		
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CPA/Accountant		
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Insurance Representative		
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Attorney		
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Executor		
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Emergency Papers or Information	Location
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### General Items

Social Security Card	
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Birth Certificate	
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Passport/Citizenship Papers	
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Drivers License number and expiration	
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Adoption Papers	
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Marriage Certificate	
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Preuptial agreement	
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Divorce or separation papers	
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Safe and Combination

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Safe deposit box and keys

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## Investment documents

Brokerage account statements

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Mutual fund account statements

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Individual retirement plan statements

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Company retirement plan statements from ALL employers

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Other company benefits

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Stock certificates not held in an account

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Bearer bonds not held in an account

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Alternative investment documents (including K-1s)

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Investment club documents

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529 College plan documents

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Online securities

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Beneficiary forms for retirement plans(IRA,401(k), 403(b), etc)

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Stock purchase and sale records

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## Insurance and Annuity Documents

Life Insurance policy documents

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Health and accident insurance ID cards and claim

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Variable or Fixed annuity statements/documents

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Mortgage insurance policy documents

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Travel insurance policy documents

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Property and Casualty insurance policy documents

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Veterans administration insurance papers

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Beneficiary forms for insurance and annuity policies

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## Personal financial documents

Appraisal or inventory of valuable items

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Buy/sell or partnership agreement documents

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Deferred compensation agreement documents

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Federal/State/Gift tax records

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Auto titles

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Boat/RV/Motorcycle titles

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Lawsuit or documents on pending legal actions

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Promissory notes(debts owed)

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Loans outstanding

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Mortgage documents

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Medical bills, prescription plan card/records

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Property and school tax records

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Rental/lease agreements

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Trust documents

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## Bank/Credit documents

Checking or money market account statements

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Checks (checking or money market)

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Savings account statements

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Credit cards and account statements

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Credit union account books or statements

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**\*\*\*Items needed when one becomes seriously ill\*\*\***

Living will/Health Care Proxy

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Durable Power of Attorney

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Financial Institution's proprietary Power of Attorney Forms

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**\*\*\*Items needed if someone passes away\*\*\***

Last Will and Testament

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Military discharge papers

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Burial instructions

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Cemetery plot deed

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Pre-paid cremation documents

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Funeral home and preference

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Charitable donation preference

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Executor letter of instruction

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Death certificates

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Phone number/Address of probate court

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***Redwood Financial Network Corp.***

**(HQ) OH** - 30285 Bruce Industrial Parkway, Suite A, Solon, OH 44139 – 440.287.5020

**CA** - 55 Canterbury Place Gilroy, CA 95020 - 408.713.3016

**FL** - 2114 Bispham Road, Suite 5, Sarasota, FL 34231 – 941.552.9401

**NC** - 1750 NW Maynard Road, Suite 114, Cary, NC 27513 – 984.500.3433

[WWW.REDWOODFN.COM](http://WWW.REDWOODFN.COM)

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