

LINCOLN
INVESTMENT PLANNING, INC.

We help people retire well.

FAMILY DOCUMENT CHECKLIST

It's important to know how to access important documents when the need arises. A copy of this checklist should be readily available to your spouse, partner or other loved ones and should be stored in a safe location. For items stored in the home, you may want to list the specific location of the documents for easy retrieval.

IMPORTANT PHONE NUMBERS:

<u>Professional</u>	<u>Name</u>	<u>Phone Number</u>
Accountant	_____	_____
Attorney	_____	_____
Financial Advisor	_____	_____
Insurance Agent	_____	_____

Emergency Papers Location

Power of Attorney	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Safe Deposit Box Key	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Living Will	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Health Care Proxy	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Organ Donor Card	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Burial Instructions	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Cemetery Plot Deed	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Other:	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	

Investment Documents Location

Investment Statements	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Annuity Statements	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Annuity Policies	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Stock Certificates	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Other:	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	

Bank & Credit Accounts Location

Credit Cards	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Bank Statements	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Checks	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	

Certificate of Deposit	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Savings Bonds	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Other:	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	

Non-Financial Papers Location

Birth Certificate(s)	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Adoption Papers	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Citizenship Papers	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Military Discharge Papers	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Social Security Card(s)	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Marriage Certificate	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Medicaid/Medicare Info	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Prescription Plan Card	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Other:	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	

Financial Papers Location

Real Estate Deed	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Mortgage Documents	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Income Tax Returns	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Automobile Titles	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Rental Agreements	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Lease Agreements	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Partnership Agreements	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Employer Comp Plans	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Promissory Notes	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Trust Documents	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Last Will & Testament	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Other:	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	

Insurance Documents Location

Life Insurance Policy(ies)	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Group Life Policy(ies)	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Long-Term Care Policy	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Disability Policy	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Veterans Administration	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Travel Insurance Policy	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Mortgage Ins. Policy	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	

Automobile Ins. Policy	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Home Owners Policy	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	
Other:	<input type="checkbox"/> Office	<input type="checkbox"/> Safety Deposit Box	<input type="checkbox"/> Attorney	<input type="checkbox"/> Home	

Additional Notes:

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