

# FINANCIAL CHECKLIST



## Did you know...?

Staying organized will actually help lower your cortisol levels—the body's primary stress hormone.

(The New York Times)

Let's try to regulate that hormone as best as possible!

We hope you enjoy this extensive financial checklist that covers all aspects of your finances. Our goal is to help you to get organized so feel free to use this checklist however you'd like.

## Income

- Pay stubs

## Debt

- Personal loan statements
- Credit card statements
- Mortgage statements
- Home equity line of credit statements

## Insurance

- Home and auto
- Renter's
- Personal liability/Umbrella
- Disability
- Medical
- Life insurance
- Other types of insurance

## Legal Documents

- Last will & testaments
- Trust
- Power of attorney

## Savings

- Savings & checking accounts

## Investments

- Retirement (401k, 403b, IRA, simple IRA, SEP IRA, etc.)
- Non-retirement (individual and joint brokerage accounts)

## Tax Returns

- 2 most recent years

## Employee Benefits Handbook

## Social Security Statements

## FOR BUSINESS OWNERS ★

- Insurance policies
- Tax returns
- Financial statements
- Business agreements

Remember to regularly review and update your system as needed to ensure it continues to meet your needs. With a little effort and attention, you can keep your documents in order and save time and stress in the long run.



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## CONTACT US

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