



DOCUMENT	DATE REVIEWED / UPDATED	POLICY NUMBERS / COMMENTS
Durable Power of Attorney		
Health Care Directive		
Trust		
Will		

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**Employment or Retirement Documents**

• 401(k) Plans		
• Pension Plans		
• Social Security benefits		
• Other Sources of Income (specify)		
• Property Ownership		
• Title		
• Auto(s)		
• Deed(s)		
• Financial Account(s)		
• Investment Account(s)		
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**Insurance Policies**

• Health		
• Life		
• Auto		
• Home		
• Disability		
• Long Term Care		
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**Military/Veterans Papers**

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**Certificates**

• Birth		
• Marriage		
• Adoption		
• Divorce		
• Death		
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