

Worksheet 4.1

LOCATE IMPORTANT DOCUMENTS

Use this worksheet to help locate the documents you will make your lawyer’s job easier. It is important to gather certain documents to assess your current financial situation, but also to determine ownership and obligations related to your real and personal property. Doing this exercise prior to meeting with professionals will save time, money, and will help them better serve your needs. Sample answers can include “file in home office”, “safe deposit box at [bank]”, “lawyer’s office”, “home computer”, etc.

DOCUMENT	WHERE IS IT?
Birth Certificates (all family members)	_____
Marriage Certificates	_____
Divorce decrees/separation	_____
Medical Records	_____
Healthcare Power of Attorney and Living Will	_____
Durable Power of Attorney	_____
Bequest list of tangible personal property	_____
Wills and Trust documents	_____
Cemetery deeds/burial instructions	_____
List of special bequests (to heirs, charity, etc.)	_____
Insurance policies	_____
Stocks, mutual fund and bond certificates	_____
Real estate deeds (county registries)	_____
Promissory notes, contracts, mortgages, receivables	_____
Partnership/corporation documents	_____
Checking/savings account statements	_____
Pension statements	_____
Income/gift tax returns	_____
Farm and other business financial statements	_____
Farm conservation contracts (NRCS, etc.)	_____
Forestry Management Plan	_____