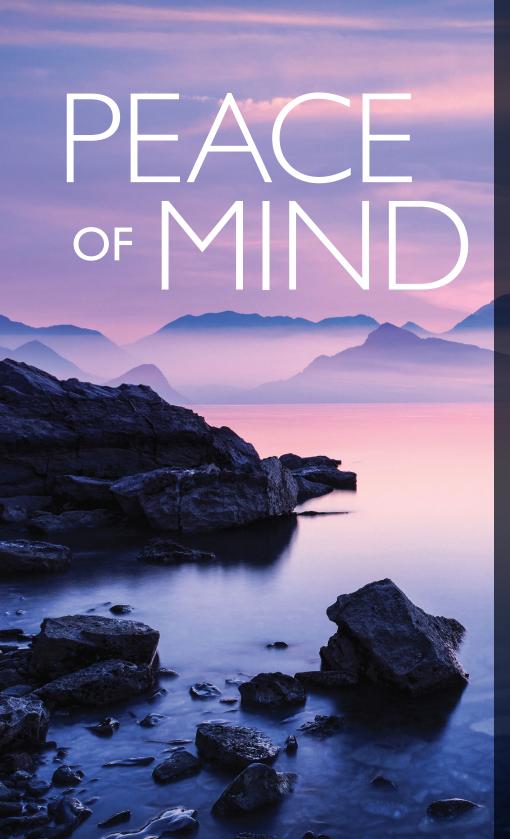
"Set peace of mind as your highest goal, and organize your life around it."

— Brian Tracy



If you're like most of us, your life has been recorded through a series of important legal documents. When major life events occur it can be difficult to find critical items. Organizing those items properly is a very wise use of your time.

In today's busy world, our lives are constantly changing. As we transition through life's experiences – changing jobs, buying a home, planning for retirement or experiencing a death in the family – we come to value the organization of our important documents. Unexpected circumstances can be stressful enough without the added worry of quickly locating the required documents.

CHECKLIST

We created this Peace of Mind Checklist to be a simple tool for organizing the vital documents of your life. We encourage you to share this checklist with your close family members, as well as your financial professional, attorney, accountant, and your executor. This may be one of the easiest, but most valuable gifts you can give yourself and your family.

CLARITAS

Your Name:	 		
Your Address: _			

If you need help completing this checklist, please let us know. You should also consult your attorney and/or certified public accountant regarding any legal and tax matters and documentation.

✓	Important Contacts	Name		Phone Number
	Financial Professional			
	CPA/Accountant			
	Insurance Agent			
	Attorney			
	Executor of Estate			
	Emergency papers and/or	Information	Location	
✓	General Items			
	Birth Certificate			
	Social Security Card			
	Passport/Citizenship (natura	alization papers)		
	Driver's License number and	d expiration date		
	Adoption papers			
	Marriage certificate			
	Pre-nuptial agreement			
	Divorce or separation pape			
	Safe deposit box(es) and ke	eys		
	Safe and combination			
√	Investment Documents			
	Brokerage account stateme			
	Mutual fund account statements			
	Annuity account statements			
	Individual retirement plan statements			
	Company retirement plan statements			
	Other company benefits (e.g. deferred compensation)			
	Stock certificates not held in an account			
	Bearer bonds not held in an			
	Alternative investment doc			
	Investment club documents			
	529 college savings plan sta			
	On-line securities access inf			
	Beneficiary Forms for IRAs, 401(k)s, or other benefits plans			
	Documents showing cost ba	sis of securities owned or sold		

	Insurance Documents Mortgage insurance policy Travel insurance policy	
	Travel insurance policy	
	Property and casualty policy documents	
	Veterans administration insurance papers	
	Beneficiary forms for insurance or annuity policies	
	Long term care insurance policy	
√	Personal Financial Documents	
	Appraisals for valuable items	
	Inventory of valuable items	
	Buy/sell or partnership agreements	
	Deferred compensation agreements	
	Federal/state gift-tax returns	
	Prior years' tax returns	
	Motor vehicle title and/or registration papers	
	Lawsuit or documents on pending legal actions	
	Promissory notes	
	Outstanding loans	
	Mortgage documents	
	Medical bills/records, prescription plan card	
	Property and school tax records	
	Real Estate deeds and/or other titles of ownership	
	Rental and/or lease agreements	
	Trust documents/agreements	
✓	Bank/Credit Documents	
	Checking or money market account statements	
	Checks	
	Savings accounts	
	Credit cards and account statements	
	Life insurance policy documents	
	Credit union account books or statements	
√	Emergency Documents	
	Living Will/Health Care Proxy	
	Durable Power of Attorney	
	Financial institution's proprietary Power of Attorney forms Some financial institutions may refuse to accept a standard Power of Attorney.	

✓	Paperwork for Final Arrangements	Location
	Last Will and Testament Wills should not be kept in a safe deposit box. Rather, wills should be stored in either a lawyer's will safe or a fireproof safe at your home.	
	Military discharge papers Veterans receive a small stipend toward burial expenses.	
	Burial instructions	
	Cemetery plot deed	
	Pre-paid cremation documents	
	Funeral home preference and information	
	Charitable donations preference(s)	
	Letter of instruction (if available) from the deceased to executor	
	Death certificate The number of accounts or titles of ownership of the deceased.	
	Phone number/address of County Surrogate Court The county court or clerk's office where the decedent resided will handle oversee estate matters and probate. The executor must obtain a sufficient number of death certificates for transferring ownership of accounts, titles, etc.	
	Information for obituaries (resume/life story/biography, etc.)	

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For assistance or additional information, please contact us at: