WOMEN & WEALTH

Checklist for Financial Readiness

Do you know how to locate each of these accounts or documents? Use this checklist to help ensure you're financially ready.

Account/Document	✓
LEGAL DOCUMENTS	
Wills	
Living Will	
Deeds	
Leases	
Revocable Trusts	
Irrevocable Trusts	
Power of Attorney	
Prenuptial Agreements	
Divorce Documentation	
Contracts	
Health Directives	
Titles to Autos, Boats, Homes	
INSURANCE POLICIES	
Life	
Long-Term Disability	
Medical	
Long-Term Care	
Car	
Property	
Casualty	
BENEFIT PROGRAMS	
Social Security	
Employment	
Pensions	
Deferred Compensation Plans	
Veterans Administration	

Account/Document	✓
BENEFIT PROGRAMS (CONTINUED)	
Retirement Funds	
Cobra	
Employer's HR Department Information	
MEDICAL RECORDS	
Medical Records	
Power of Attorney for Healthcare	
List of Allergies	
List of Medications	
BANK AND INVESTMENT STATEMENTS	
Pensions	
IRAs	
Annuities	
Investment Accounts	
Bank Statements	
Brokerage Statements	
401(k) Statements	
Stock Options	
LIABILITIES	
Credit Cards	
Personal Loans	
Auto Loans	
Mortgage(s)	
Brokerage Statement	
Utilities	

Account/Document	✓
TAXES	
Tax Returns	
Asset Valuation	
Income, Estate or Inheritance	
W-2 Forms	
Prior Income and Gift Tax Returns	
IDENTIFICATION	
Birth Certificates	
Drivers Licenses	
Passports	
FAMILY	
Adoption Papers	
Marriage License	
Membership Information	
Birth Certificates for Minor or Dependent Children	
BUSINESS ENTITY DOCUMENTS	
Partnership Agreements	
Limited Liability Company Certificate	
S-Corporation Articles of Incorporation	
S-Corporation Stock Certificate	
Buy/Sell Agreements	
MISCELLANEOUS	
Safe Deposit Boxes Keys/Combinations	
All Account Passwords: please ensure these are stored in a place appropriate for your family	
ADDITIONAL ITEMS	

BMO Wealth Management
BMO Private Bank