

FINANCIAL DOCUMENTS CHECKLIST

A critical component of the financial planning process is understanding the various aspects of your financial affairs. As parents and loved ones age, it's important for family members, beneficiaries and/or executors of the estate to have some degree of visibility into key records in the event of unanticipated illness, incapacitation, or passing.

We recommend gathering the following information:

- Social Security number
- Safe deposit box number, its location and the location of the key
- Location of tax records
- Location of homeownership papers, mortgage and title
- Most recent will and estate-planning paperwork
- Insurance and policy numbers, as well as their issuer
- Name and location of accountant, attorney, and stockbroker or financial advisor
- Bank account numbers and location
- Financial investments, such as mutual funds, certificates of deposit, or bonds
- Contact name and account numbers for pensions and 401(k)s
- Location of auto and other vehicle titles
- Details of outstanding debts
- Funeral and burial wishes
- Account information for utilities and/or any bills on automatic payment plans

Collecting and filing this information, as well as having open, honest discussions with parents and relatives, can help you mitigate confusion and chaos when a loved one departs.

LET US HELP YOU PLAN FOR THE FUTURE.
CONTACT YOUR ADVISOR TODAY TO LEARN ABOUT OUR
FINANCIAL PLANNING AND ESTATE PLANNING SERVICES.

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