

# Review Checklist



Use this checklist to review your financial situation and track important conversations with your advisor.

<input checked="" type="checkbox"/> ITEM	LOCATION/PROVIDER	DATE DISCUSSED	DATE COMPLETED
<b>Health</b>			
<input type="checkbox"/> Emergency contacts			
<input type="checkbox"/> Medications and supplements			
<input type="checkbox"/> Health insurance			
<input type="checkbox"/> Health information and history			
<input type="checkbox"/> Living will/advance directive			
<input type="checkbox"/> Medical power of attorney			
<b>Banking and Investments</b>			
<input type="checkbox"/> Bank accounts			
<input type="checkbox"/> Investments			
<input type="checkbox"/> Retirement accounts			
<input type="checkbox"/> Safe deposit boxes			
<input type="checkbox"/> Credit cards			
<input type="checkbox"/> Mortgages and loans			
<input type="checkbox"/> Important financial contacts			
<b>Insurance</b>			
<input type="checkbox"/> Personal insurance			
<input type="checkbox"/> Property insurance			
<b>Estate</b>			
<input type="checkbox"/> Will and estate plan			
<input type="checkbox"/> Funeral arrangements			
<input type="checkbox"/> Other important information			
<b>Personal</b>			
<input type="checkbox"/> Identification			
<input type="checkbox"/> Property and titles			
<input type="checkbox"/> Important tax documents			
<input type="checkbox"/> Online accounts and passwords			
<input type="checkbox"/> Membership and subscriptions			
<input type="checkbox"/> Other important documents			
<b>Miscellaneous</b>			
<input type="checkbox"/>			
<input type="checkbox"/>			