

LAW OFFICES OF DANA BOWIE P.O. BOX 3204 WINTER PARK, FL. 32790
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PLANNING CHECKLIST

DOCUMENTS:

1. HEALTHCARE PROXY/LIVING WILL
2. POWER OF ATTORNEY
3. WILL
4. ORGAN DONATION CARD/INSTRUCTIONS
5. CEMETARY DEED/FUNERAL INSTRUCTIONS
6. INSURANCE POLICIES:
 - A. HEALTH INSURANCE POLICY
 - B. LIFE INSURANCE POLICY
 - C. DISABILITY INSURANCE POLICY
 - D. LONG TERM CARE INSURANCE POLICY
 - E. CAR INSURANCE POLICY
 - F. HOMEOWNER'S INSURANCE POLICY
7. EXISTING TRUST DOCUMENTS, WHERE YOU ARE THE DONOR/BENEFICIARY.
8. BUSINESS (PARTNERSHIP/SHAREHOLDER) AGREEMENTS.

PLANNING CHECKLIST-PAGE TWO

DOCUMENTS

9. DEEDS TO REAL PROPERTY

10. RECENT TAX BILL ASSOCIATED WITH DEEDS

11. REAL PROPERTY APPRAISALS, IF ANY.

12. PRIOR GIFT TAX RETURNS.

13. LAST FEDERAL INCOME TAX RETURN.

14. PRENUPTIAL AGREEMENTS.

15. WAIVER OF RIGHTS ELECTION.

16. OTHER (GUARDIANSHIP PAPERS, CITIZENSHIP PAPERS, MILITARY SERVICE RECORDS, VISA/PASSPORT, BIRTH CERTIFICATE, DIVORCE/ SEPARATION AGREEMENT, ADOPTION PAPERS)

YOU SHOULD ALSO HAVE THE NAMES, ADDRESSES, AND PHONE NUMBERS OF THE FOLLOWING ADVISORS:

| | NAME | ADDRESS | PHONE # |
|-------------------|-------|---------|---------|
| ATTORNEY | _____ | _____ | _____ |
| ACCOUNTANT | _____ | _____ | _____ |
| INSURANCE AGENT | _____ | _____ | _____ |
| FINANCIAL PLANNER | _____ | _____ | _____ |

PLANNING CHECKLIST-PAGE THREE

ASSETS:

17. RETIREMENT PLAN BENEFITS

18. IRAs/KEOGHS

19. 401Ks

20. COPY OF CURRENT BENEFICIARY ELECTIONS.

21. LIST OF BANK ACCOUNTS.

22. LIST OF BROKERAGE ACCOUNTS/MUTUAL FUNDS.

23. SAFE DEPOSIT BOX NUMBER AND LOCATION AND AUTHORIZED SIGNATORIES.

24. ANTIQUES. (FURNITURE AND PERSONAL POSSESSIONS)

25 COIN COLLECTIONS.