Review Checklist

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

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