



Alpha Sigma Wisconsin Chapter
Epsilon Sigma Phi
NATIONAL HONORARY EXTENSION FRATERNITY

ORGANIZING YOUR PERSONAL AND FINANCIAL DOCUMENTS

Most people underestimate the importance of organizing and updating their personal and financial records. Having an organized, comprehensive set of information is **crucial**. In the event of the death or incapacity of you or your spouse/partner, here is a list of documents with space to indicate where you keep them. It is **IMPORTANT THAT YOU REVIEW AND REVISE THE LIST PERIODICALLY (AT LEAST ANNUALLY)**. Each spouse and partner should fill out his or her own list. Use additional paper if necessary.

BE SURE TO GIVE A COPY OF THIS LIST TO TRUSTED FAMILY MEMBERS, THE PERSONAL REPRESENTATIVE (EXECUTOR) YOU NAMED IN YOUR WILL, AND THE TRUSTEE (OR SUCCESSOR TRUSTEE) OF YOUR LIVING TRUST, IF ANY.

Date(s) list prepared: _____

A. List of professionals and closest relatives (Name, phone number, and address):

Attorney _____

Accountant _____

Health care providers _____

Dentist _____

Personal Representative (Executor) _____

Trustee(s) of living trust(s) _____

Financial Planner _____

Stock Broker(s) _____

Insurance Agent(s) (car, home, other) _____

Closest Relatives _____

OTHERS: _____

B. PERSONAL DOCUMENTS/INFORMATION (indicate current location on adjoining line or indicate if not applicable)

Safety deposit box/key _____

Home safe location/combination or key _____

Birth certificates (for all family members) _____

Marriage certificate _____

Divorce papers _____

Adoption papers _____

Naturalization papers _____

Passport _____

Educational degrees _____

Military papers _____

Death certificates _____

Burial Contracts/instructions _____

Marital property/pre-nuptial agreement(s) _____

WILL (Including formal amendments) _____

Living trust(s) _____

Living will _____

Power of Attorney for Health Care _____

agent's name and phone number _____

Power of Attorney for Finances _____

agent's name and phone number _____

Upon death - organ/body donation _____

Arrangements for pets _____

OTHER: _____

C. FINANCIAL DOCUMENTS AND INFORMATION:

Wisconsin Retirement _____

Federal Retirement _____

Other Pension plans _____

Other employee-related deferred employment benefit plans _____

Real estate deeds, mortgages, and abstracts (primary and secondary homes/condos,
rental property) _____

Homeowner/renter insurance _____

Life insurance (including VA, group, term) _____

Bank accounts and current bank statements _____

Credit cards/current statements/insurance benefits _____

Social Security statements/papers _____

Investments: Stocks _____
 Bonds _____
 Mutual funds _____

Other investment account statements _____

Auto/boat/RV - titles/insurance/loans _____

Health insurance _____

Long-term care insurance _____

Income tax returns for prior 5-6 years _____

Current income tax information _____

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- Gift tax filings _____
- Appraisals _____
- Loan papers _____
- Personal property inventory/video (home and secondary residences) _____

- Financial plan _____
- Royalties/patents/etc. _____
- Partnership agreements _____
- Accumulated sick leave credit escrow statement (university - state employees)

- OTHER: _____

END NOTE

It is strongly recommended that Wisconsin residents deposit their wills with the Register in the Probate of their county of residence. The deposited will is placed in a sealed envelope. During the person's lifetime, he or she may withdraw the will.