DOCUMENT LOCATOR

PARADIGM WEALTH PARTNERS

Good record keeping is a key component of sound financial management. Please gather the following documents. We will review these documents with you during your initial planning meeting.

Document	Account Number	Location
Birth Certificates		
Marriage Certificate		
Children’s Birth Certificates		
Social Security Card		
Divorce Decree		
Passport		
Legal Documents		
*Financial Power of Attorney		
*Healthcare Power of Attorney		
*Living WIll		
*Will/Trust Documents		
Insurance Policies		
*Life		
*Health		
*Disability		
*Homeowner’s/Renter’s		
*Automobile		
Employee Benefit Data		
*Group Insurance		
*Pension Plan		
*Profit-Sharing Plan		
*401(k), 403(b)		
Other		
Banking Records		
*Checking Account Balance		
*Savings Account Balance		
*Money Market Account Balance		
*Checking Statements		
*Certificates of Deposit (CD)		
*Safe Deposit Box		
Investment Records		
*Investment Statements		
*IRA/ROTH IRA Statements		
*Annuity Statements		
*Stock/Bond Certificates		
Income Tax Records		
*Most Recent Tax Return		
Housing Records		
Improvements		
*Property Tax Payments		
*Mortgage/Rental Statements		
Appliance Warranties		
*Credit/Charge Cards		
*Consumer Debt		
Other		

** Please provide these items at your initial planning meeting*

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