

Summary of Documents



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Name

Date

Do you have any of the following documents? If so, please . . .

- √ Check each document you have.
- √ Provide us with the original or duplicate copy of each such document or at least as many of them as you can easily find.

- | | |
|---|---|
| <input type="checkbox"/> Deeds | <input type="checkbox"/> Balance sheets, personal |
| <input type="checkbox"/> Bills of sale | <input type="checkbox"/> Balance sheets, business |
| <input type="checkbox"/> Leases | <input type="checkbox"/> Tax returns, personal (3 years) |
| <input type="checkbox"/> Stocks | <input type="checkbox"/> Tax returns, business (3 years) |
| <input type="checkbox"/> Bonds | <input type="checkbox"/> Profit / loss statements, business |
| <input type="checkbox"/> Savings accounts | <input type="checkbox"/> Stockholder agreements |
| <input type="checkbox"/> Certificates of deposit | <input type="checkbox"/> Partnership agreements |
| <input type="checkbox"/> Checking accounts | <input type="checkbox"/> Articles of incorporation |
| <input type="checkbox"/> Deeds of trust / mortgages | <input type="checkbox"/> By-laws, minutes, stock books |
| <input type="checkbox"/> Notes | <input type="checkbox"/> Buy-sell agreements |
| <input type="checkbox"/> Pension plans | <input type="checkbox"/> Tax assessments |
| <input type="checkbox"/> Profit sharing plans | <input type="checkbox"/> Surveys |
| <input type="checkbox"/> Stock bonus plans | <input type="checkbox"/> Life insurance policies |
| <input type="checkbox"/> Deferred compensation agreements with employer | <input type="checkbox"/> Other insurance policies, such as homeowner's, commercial policies |
| <input type="checkbox"/> Annuities | <input type="checkbox"/> Wills |
| <input type="checkbox"/> IRA Documents | <input type="checkbox"/> Trust agreements |
| <input type="checkbox"/> Pre-post nuptial contracts | <input type="checkbox"/> Gift tax returns |