

Where to find it



Document

Location

Tax returns from previous three years and supporting documents

Life insurance contracts

Health insurance contracts

Long-term care insurance contracts

Disability income insurance contracts

Medicare supplement insurance contracts

Homeowner's insurance policies

Vehicle insurance policies

Checking account statements

Savings account statements

Money market statements

Certificate of deposit statements

Mutual fund statements

Stock certificates

Bonds (savings and other)

Credit cards

Credit card records

Mortgage papers

Auto loan/lease papers

Home equity loan papers

Personal loan papers

Profit-sharing statements

Pension statements
