

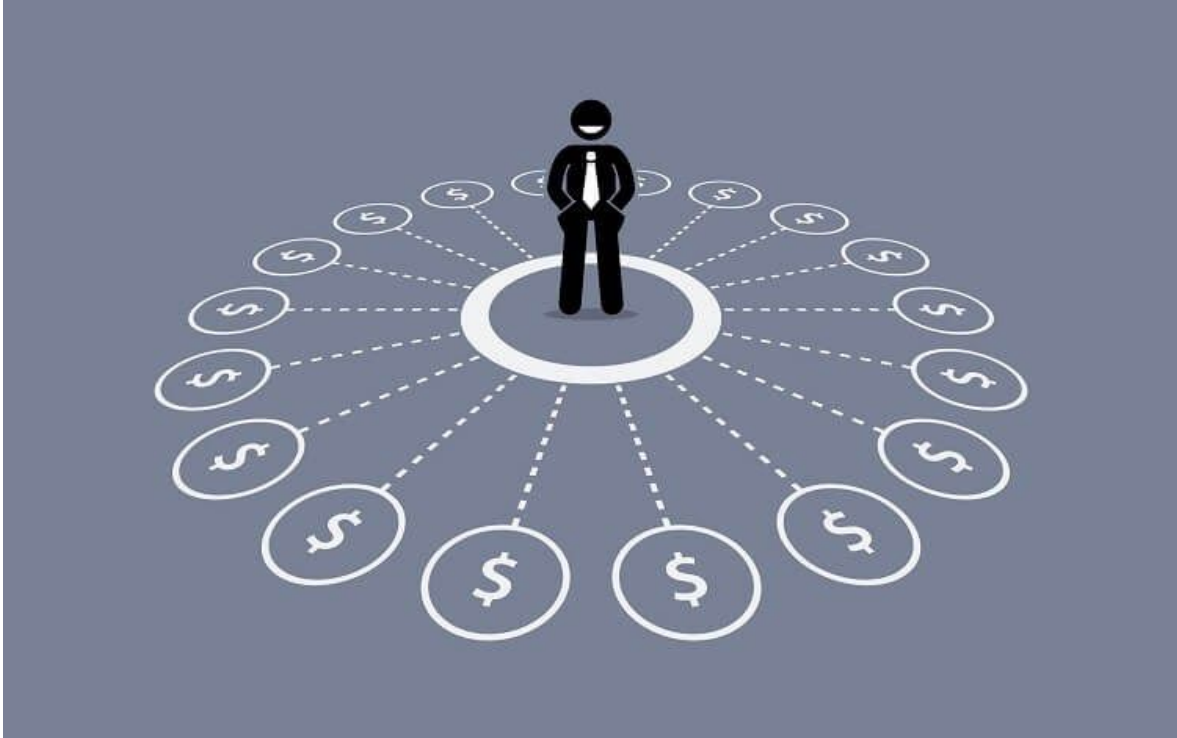
Planning Worksheet



Paperwork to Gather

<input type="checkbox"/>	Social Security numbers
<input type="checkbox"/>	Bank accounts information
<input type="checkbox"/>	Safe Deposit box information and keys
<input type="checkbox"/>	Checkbooks and blanks
<input type="checkbox"/>	Credit card accounts
<input type="checkbox"/>	Pension information
<input type="checkbox"/>	Investment information
<input type="checkbox"/>	Stock & Bond information

<input type="checkbox"/>	IRA and 401(k) information
<input type="checkbox"/>	Stockbrokers/personal bankers
<input type="checkbox"/>	Health insurance information Military discharge papers
<input type="checkbox"/>	Mortgage documents
<input type="checkbox"/>	Deeds
<input type="checkbox"/>	Divorce/marriage/adoption/birth records
<input type="checkbox"/>	Wills
<input type="checkbox"/>	Cemetery plot deeds
<input type="checkbox"/>	Insurance policies –life, home, auto, etc.
<input type="checkbox"/>	Social Security numbers
<input type="checkbox"/>	Bank accounts information



Possible Sources of Income To Track Down

<input type="checkbox"/>	Salary
<input type="checkbox"/>	Retirement pensions
<input type="checkbox"/>	Social security benefits
<input type="checkbox"/>	Military pay
<input type="checkbox"/>	Investments including properties, 401k's, and stocks
<input type="checkbox"/>	Insurance policies
<input type="checkbox"/>	Passive Income like: bank intrest, capital gains, royalties, rental income,
<input type="checkbox"/>	Business income



Possible Financial Obligations

<input type="checkbox"/>	Mortgages
<input type="checkbox"/>	Property taxes
<input type="checkbox"/>	Credit cards
<input type="checkbox"/>	Utilities and services
<input type="checkbox"/>	Insurance premiums
<input type="checkbox"/>	Phone bills
<input type="checkbox"/>	Car loans
<input type="checkbox"/>	Student loans
<input type="checkbox"/>	Timeshares
<input type="checkbox"/>	Automated billing
<input type="checkbox"/>	Etc...