



LifeList

An essential register of your important documents and data

NAME(S): _____

DATE: _____

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Whether you're buying a home, starting your own business, or retiring, life's major events can be a challenge. So can finding the documents you need.

The SageVest LifeList is designed to help you organize the important paperwork and information associated with key aspects of your life. It serves as a reference list of where each document or piece of information can be found. Recording the location of these critical papers and facts not only makes it easier for you to keep track of essential documents and data for your own purposes, but it also allows you to easily share that information with loved ones, including your estate executor(s), and other financial or legal professionals who may need this important information.

To complete the SageVest LifeList, simply record your details manually in the spaces provided. An electronic version of this document is also available upon request. Be sure to keep the completed document in a safe, yet accessible, place.

KEY CONTACTS	
Contact	Contact Information
Investment Advisor	
CPA/Accountant	
Insurance Agent(s)	
Attorney	
Primary Physician	
Other	
Other	

GENERAL ITEMS & INFORMATION		
Item	Location of information	
Social Security Card		
Birth Certificate		
Passport		
Driver's License & Expiry		
Citizenship Papers		
Adoption Papers		
Pre-nuptial Agreement		
Marriage Certificate		
Divorce/Separation Papers		
Safe Location & Combination		
Safe Deposit Box(es) & Key(s)		
Other		
Other		
BANK & CREDIT DOCUMENTS		
Item	Location of Information	Online login information
Checking & Money Market Account Statement(s)		
Savings Account Statement(s)		
Credit Card Statements		
Credit Union Account Book(s) or Statement(s)		
Other		

PERSONAL FINANCIAL DOCUMENTS & INFORMATION		
Item	Location of Information	Online login information
Federal/State/Gift Tax Returns		
Mortgage Documents		
Real Estate Deed(s)		
Motor Vehicle Title(s)		
Other Titles of Ownership		
Rental and/or Lease Documents		
Property & School Tax Records		
Promissory Note(s) – debts owed to you by others		
Outstanding Loan(s) – debts owed by you to others		
Medical & Prescription Plan Information		
Deferred Compensation Agreement(s)		
Buy/Sell Partnership Agreement(s)		
Appraisal Documents or Inventory of Valuable Items		
Lawsuit or Pending Legal Action Document(s)		
Other		
INVESTMENT DOCUMENTS & INFORMATION		
Item	Location of information	Online login information
Brokerage Statements		
Company Retirement Plans (ALL Employers)		

INVESTMENT DOCUMENTS & INFORMATION (continued)

Item	Location of information	Online login information
Other Company Benefit Information		
Stock Certificates not in an Account		
Bearer Bonds not in an Account		
529 College Savings Plan Statements		
Beneficiary Forms (401(k), IRA, other beneficiary plans)		
Cost basis data for assets not reported on statements		
Other		

INSURANCE & ANNUITY DOCUMENTS

Item	Location of information	Online login information
Life Insurance Policy(ies)		
Group Insurance Policy(ies)		
Health & Accident Insurance ID Cards & Claim Records		
Variable or Fixed Annuity Statements		
Mortgage Insurance Policy		
Property & Casualty Insurance Policy(ies)		
Veteran Administration Insurance Papers		
Insurance/Annuity Policy Beneficiary Forms		
Long Term Care Policy		
Other		

SURROGATE AGENT DOCUMENTS

Item	Location of Information	Online login information
Living Will/Health Care Proxy		
Power of Attorney		
Proprietary Financial Institution Power(s) of Attorney		

ESTATE PAPERS & RELATED INFORMATION

Item	Location of Information	Online login information
Last Will & Testament		
Trust Documents		
Military Discharge Papers		
Burial Instructions		
Cemetery Plot Deed		
Pre-Paid Cremation Document(s)		
Funeral Home Information		
Letter of Instruction (Optional – from you to your Executor(s))		
Other		
Other		

ADDITIONAL DOCUMENTS

Item	Location of Information	Online login information
Other		
Other		
Other		