Janus Henderson INVESTORS

FINANCIAL RECORDS ORGANIZATION CHECKLIST

Wealth Management Brought to You by Knowledge Labs®

We've created this checklist as a guide to help you organize important financial documents to be better prepared to manage affairs after a catastrophe, serious illness, disability or death. Broken out by topic, these are just some examples of how you can organize your binder or file system.

Insurance

- ☐ Health Insurance Forms:
  - ☐ Long Term Care (LTC)
  - ☐ HSA/HRA/FSA
- ☐ Property & Casualty Policies
- ☐ Disability & Life Policies

Tax Returns

- ☐ Tax returns from the last 3 years

Retirement Specific

- ☐ 401(k) Account Statements
- ☐ Pension Statements
- ☐ Social Security Statements and Correspondence

Investments

- ☐ Brokerage Statements
  - ☐ IRA
  - ☐ Taxable
  - ☐ 529
  - ☐ ABLE
- ☐ 1099 Mailings

Banking

- ☐ Checking Account
- ☐ Savings Account
- ☐ Credit Card Statements and Payment History

Loans

- ☐ Mortgages
- ☐ Car
- ☐ Student loans

Legal Documents

- ☐ Wills
- ☐ Trust Documents
- ☐ Durable Power of Attorney
- ☐ Health Care Proxy
- ☐ Deeds to House/Car

FOR MORE INFORMATION, PLEASE VISIT **JANUSHENDERSON.COM**

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