

Thank you for downloading the Personal Wealth Guide. Below is information that should help you gather your valuable documents. We recommend using a loose leaf format notebook to help you customize it and make it easy to update.

## Organizing Your Life's Valuable Financial Information



To get started gather all your information. It's a good idea to make copies of important documents and possessions via pdf and photos for your computer and backups.

1. Gather all your important documents. The list below will help, and you will need much of this to complete your Personal Wealth Guide.

2. Gather important names, addresses, phone numbers, and email addresses. These people would include your financial advisors, CPA, attorney, banker, insurance agent, investment advisor, minister, and anyone who has an interest in your welfare.
3. Gather account numbers for banks, investments, annuities, mortgages.
4. Remember to share this with heirs and beneficiaries. Having this information will help your professional advisors enhance your planning and offset deficiencies.
5. Keep in a safe place. It's good for it to be accessible for updates.
6. Review and update regularly.

Once you have gathered your documents and have your notebook, set it up with tabs for identification. For example, tab subjects are: Estate Plan, Living Trust, Irrevocable Trust(s), Other Trusts, Wills, Property Agreements, Deeds, Business Agreements, Tax Returns, Property Taxes, Gift Transfers, Charitable Transfers, Real Estate Transfers, Special Instructions, Life Insurance, Health/LTC Insurance, Casualty/Property Insurance, Durable Power of Attorney, Advance Health Care Directive, Miscellaneous.

I like to keep copies of these documents in a 3 Ring Binder Box with a clasp on the side. It fits nicely on my bookshelf, and is easy to organize and handle. So here's the list of documents to gather.

## Originals:

- Birth and Death Certificates
- Papers concerning Marriage and Divorce
- Adoption/Naturalization or Alien Registration
- Baptismal and other Religious Certificates
- Deeds and other records of ownership
- Stocks, Bonds and other investment certificates
- Mutual Fund and Investment accounts
- Retirement accounts

## Personal Property Inventory for Insurance Purposes:

- Description of possessions that are important to you
- List of Model numbers and years for major appliances and electronic items
- Photographs, CDs or Videotapes showing the condition and quality of your valuables.
- Appraisals of expensive items such as antiques, artwork, furs, jewelry, collectibles
- Sales receipts to help establish the value of your more expensive belongings

## Legal Papers

- Last Wills and Testaments and Trusts
- Powers of Attorney
- Business Contracts
- Military Documents
- Real estate deeds
- Passports
- Leases
- Divorce, Separation and Child Custody Agreements

- Social Security information
- Notes receivable
- Personal and Business Tax Returns

### List of Insurance Policies and their Numbers

- You can keep actual insurance policies at home and a copy in a safe deposit box. Insurance companies will replace them if necessary

### Valuables Infrequently Accessed

- Seldom worn, expensive jewelry
- Gold coins
- Stamp and other valuable collections
- Negatives of treasured family photos (and any other items that are valuable to you and that you want to keep secure)

If we can help, give us a call. Congratulations. You have taken the first step toward a successful profit plan.



**Woodie M. Montgomery, RFC, CEC**

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**Personal Wealth Guide for \_\_\_\_\_ Dated \_\_\_\_\_**

**1. Assets - Stocks, Bonds, Mutual Funds, Annuities, Bank Accounts, Real Estate, etc.**

Company or Property Address	Account #	Date Started	Type of Account	Beginning Balance	Deposits	Year End Balance	Advisor Name	Phone Number
(bank)			checking					
(bank)			savings					
(investment)			personal					
(retirement)			IRA					
(retirement)			401k					
(Residence)			equity					
(Rental Property)			equity					

**2. Insurance**

Type	Owner	Beneficiary	Insured	Company	Policy Date	Face Amt.	Deductible	Cash Value	Policy No.	Mo. Benefit/ Ben. Period
Life										
Life										
Life										
Life										
Health										
Disability										
Disability										
LTC										
Auto										
Homeowners										
Umbrella										
Rental										
Rental										
Rental										
Rental										

**3. Asset Protection**

	Grantor/Exchangor	Trustee(s)	Manager(s) Officer(s)	Name	Members	Unit Holders	Beneficiary(s) Future Unit Holders	Date Signed	TIN
Trust									
Trust			N/A						
Corporation		N/A					N/A		
Corporation		N/A					N/A		
LLC		N/A					N/A		
LLC		N/A					N/A		
Family L.P.		N/A							

