Power To Win:

Essential Preparation Toolkit

SESSION 2

FINANCIAL INFORMATION

1. Sources of Income and Assets

- List all sources of income (e.g., pension, IRAs, 401(k)s, interest).

2. Social Security Information

- Provide details regarding your Social Security benefits.

3. Insurance Information

- Include policy numbers and agent names/phone numbers for:
    - Life insurance
    - Long-term care insurance
    - Home insurance
    - Car insurance

4. Banking Information

- List names of banks and account numbers (e.g., checking, savings, credit union).

5. Investment Income

- Specify income from stocks, bonds, or properties.

- Include stockbrokers' names and contact information.

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6. Tax Information

- Attach a copy of your most recent income tax return.

7. Legal Documents

- Provide the location of the most up-to-date will with an original signature.

8. Liabilities

- List property taxes, amounts owed, creditors, and payment due dates.

9. Mortgage and Debt Information

- Detail how and when mortgages and debts are paid.

10. Property Documents

- Indicate the location of the original deed of trust for your home.

11. Vehicle Information

- Include car title and registration details.

12. Credit and Debit Card Details

- List card names and numbers.

13. Safe Deposit Box

- Provide the location of the safe deposit box and the key.