

Financial Documents Checklist

Your Journey. Your Goals. Your Summit.

Use this worksheet as an educational starting point. Add notes that reflect your household.

☐ **Income and tax records**

☐ **Bank and credit statements**

☐ **Loan documents**

☐ **Insurance policies**

☐ **Retirement statements**

☐ **Property records**

☐ **Estate documents**

☐ **Secure storage and access plan**
