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Retiring & Your Golden Years—Applications

Checklist: Documents to Show Your Attorney when Planning to Retire

In order to ensure the most secure retirement, gather the following documents together and provide copies to your attorney, along with any others he or she specifically requests. By so doing, the two of you can work together as partners to plan your golden years in a manner that protects the immediate and long-term interests of you and your heirs.

- Individual income tax returns for past three to five years (federal, state, and local)
- Business income tax returns for past three to five years (federal, state, and local)
- Proof of your current income
- Proof or spouse's current income
- Prenuptial agreement
- Bank statements
- Certificates of Deposit
- Pension statements
- Retirement account statements
- Social security estimate of benefits
- Trusts
- Stock portfolios
- Stock options
- Mortgages
- Property tax statements
- Credit card statements

- ___ Loan documents
- ___ Utility bills
- ___ Other bills (e.g., children's college tuition, health and dental insurance premiums, unreimbursed medical bills, etc.)
- ___ Monthly budget worksheet
- ___ Completed financial statements
- ___ Employment contracts
- ___ Benefits statements
- ___ Life insurance policies
- ___ Health insurance policies
- ___ Homeowner's insurance policies
- ___ Automobile insurance policies
- ___ Personal property appraisals
- ___ Real property appraisals
- ___ List of personal property, including home furnishings, jewelry, artwork, computers, home office equipment, clothing and furs, etc.
- ___ List of property owned by each spouse prior to marriage
- ___ List of property acquired by each spouse individually by gift or inheritance during the marriage
- ___ List of contents of safety deposit boxes
- ___ Wills
- ___ Living Wills
- ___ Powers of Attorney
- ___ Durable Powers of Attorney

____ Advance Health Care Directives