

Financial first aid kit checklist

Harris Kagan, CLU, ChFC, RICP
Financial Adviser for Eagle Strategies LLC
Registered Representative for NYLIFE Securities LLC
(Member FINRA/SIPC), a licensed insurance agency.
Eagle Strategies LLC and NYLIFE Securities LLC are New York Life companies.
Agent, New York Life Insurance Company,

CA Insurance Lic. #0694597
1608 Pandora Ave., Los Angeles CA 90024
310-663-4637 hkagan@eaglestrategies.com

The following list is to help you determine what items are important for you to include in your financial first aid kit.

Include Copies of the Following:	
Contact information for financial professionals, insurance representative, and attorney	Life and property and casualty insurance policy documents
Birth certificate	Immunization records
Adoption papers	Health insurance ID cards
Marriage certificate	Bank and credit card account numbers
Prenuptial agreement	Personal checks
Divorce or separation papers	Stocks, bonds, and brokerage account statements
Citizenship document	Beneficiary designations for retirement plans, insurance policies, and investment accounts
Driver's license or other personal identification	Retirement plan documents
Social Security card	Military discharge papers
Passport	Safe deposit box keys
Will	
Deed(s)	