

LEGAL AND FINANCIAL WORKSHEET: Assets

LEGAL AND FINANCIAL WORKSHEET: Expenses

800.27

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EXPENSES	Account Number	Institution Name	Institution Address	Institution Phone Number	Payment Amount	Payment Due Date	Location of Document(s)
Medical / Re Pa e							
Private Tu e							
Da Pa e							
Ad / C d S							
U e							
Other / a ce Pe / R ce							
Total Monthly Expenses							

LEGAL AND FINANCIAL WORKSHEET: Legal Documents and Miscellaneous

LEGAL DOCUMENTS	Owner(s)	Location of Document(s)	Notes
State ID/ Driver's License			
Passport			
Marriage License			
Social Security Card			
Living Will			
Power of Attorney (Power)			
Power of Attorney (Health Care)			
Standard Will			
Vehicle Registration			
Birth Certificate			

MISCELLANEOUS	Account Number	Institution Address	Institution Phone Number	Location of Document(s)
Safe Deposit Box				