



HARVEY

HARVEY INVESTMENT
MANAGEMENT, INC.
FINANCIAL DOCUMENT ORGANIZER

Organizing your financial documents is an important first step in your financial planning journey. To assist you in that process, we have created this document to help you keep track of your important documents.

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HarveyInvestmentManagement.com

Harvey Investment Management, Inc. is an affiliate of Resolute Independent Advisors, LLC.

Securities offered through HighTower Securities, LLC | Member FINRA / SIPC. Hightower Advisors, LLC is a SEC registered investment advisor.



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FINANCIAL DOCUMENT ORGANIZER

CLIENT NAME: _____

<u>Document</u>	<u>Location</u>	<u>Date Updated</u>	
Adoption Papers	_____	_____	Original Copy
Audio Files	_____	_____	Original Copy
Bank & Investment Statements	_____	_____	Original Copy
Birth Certificates	_____	_____	Original Copy
Codicils (supplements made to will)	_____	_____	Original Copy
Contracts	_____	_____	Original Copy
Credit Cards	_____	_____	Original Copy
Deeds	_____	_____	Original Copy
Drivers' Licenses	_____	_____	Original Copy
Employment Benefits	_____	_____	Original Copy
Frequent Flyer Information	_____	_____	Original Copy
Information on Employers	_____	_____	Original Copy
Insurance Policies	_____	_____	Original Copy
Investment Accounts	_____	_____	Original Copy
Living Wills/Health Directives	_____	_____	Original Copy



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<u>Document</u>	<u>Location</u>	<u>Date Updated</u>	
Loans	_____	_____	Original Copy
Location of Safe Deposit Boxes and Keys	_____	_____	Original Copy
Marriage License	_____	_____	Original Copy
Medical Records	_____	_____	Original Copy
Miscellaneous	_____	_____	Original Copy
Mortgages	_____	_____	Original Copy
Passports	_____	_____	Original Copy
Pay Stubs	_____	_____	Original Copy
Pensions, IRAs, Annuities, etc	_____	_____	Original Copy
Pictures	_____	_____	Original Copy
Power of Attorney	_____	_____	Original Copy
Prenuptial Agreements	_____	_____	Original Copy
Revocable and Irrevocable Trusts	_____	_____	Original Copy
Social Security and/or Veteran's Admin Info	_____	_____	Original Copy
Stock Options/ Certificates	_____	_____	Original Copy



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<u>Document</u>	<u>Location</u>	<u>Date Updated</u>	
Tax Returns	_____	_____	Original Copy
Titles (homes, autos, boats, etc.)	_____	_____	Original Copy
Video Clips	_____	_____	Original Copy
W-2 Forms	_____	_____	Original Copy
Warranties	_____	_____	Original Copy
Wills	_____	_____	Original Copy