

## **Documents to have in your SWAN Binder:**

- **Home Insurance Declaration Page**
- **Auto Insurance Declaration Page**
- **Life Insurance**
- **Long Term Care Insurance Policies**
- **Tax Returns 2 yrs.**
- **Investments** (Not a print out. Full Monthly or Quarterly Statement)
- **Legal Documents (Will, Power of Atty, Trusts, Living Will)**
- **Property Deed. If Applicable Mortgage Statement**
- **Bank Statement (1 Month)**
- **Social Security Estimates**
- **Beneficiary Info: Full Names, Percentages, SSN's and DOB's**