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1. BY HAND: Print this blank form, complete and file printed paper copy in a secure location.
2. ON SCREEN: Complete form on-screen and print. File printed paper copy.
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Business Documents

Use this form to record the location of all business-related documents.

You can create and save as many pages as you need

Page ____ of ____ Pages

Item	Location
Income and Expense Records	
Self-Employment Business Agreements	
Succession Plan	
Buy-Sell Agreements	
Letters of Instruction	
Business Valuation Reports	
Business Bank Account Records	
Business Credit Cards	
Deferred Compensation Agreements	
Company-Owned Real Estate	
Notes Receivable	
Notes Payable	
Key-Man Insurance Policy	
Company-Owned Life Insurance Policies	
Independent Contractor 1099s	
Rental or Lease Agreements	
List of Vendors	
List of Customers	
Business Tax Returns (last 3 years)	
Retirement and Pension Agreements	
Contracts:	
Other:	