Sections of the Playbook

Playbook Tab	Purpose
Goals and Objectives	Clearly articulate your Financial Goals and Objectives. Consider your long term vision as well as what happens when someone else takes over your assets. Are there special considerations for people you love? Do you want to support or not support certain types of industries in your asset mix?
Financial Statements	Store one copy of a statement for each financial relationship you have here. It should be dated within a year. Do not store more than one statement for each account. Keep your Net Worth Statements and Cash Flow Statements for each year you create them. This creates a history of the values you need.
Estate and Legal Docs	Your Will, Trust, POA's, legal contracts and any other legal documents you may need go here. You might also include letters to loved ones or your 'departure file' instructions here. This is also where you store your beneficiary review statement.
Insurance	Keep a summary page of all of your insurnace information here as well as the most recent copy of a statement.
Taxes	Store 1099's, W2's, property tax statements and anything tax related here.
Performance Reporting	What ever methond you use to evaluate performance goes here.
Social Security and Pensions	A copy of your Social Security Statements along with supporting information on filing strategies.
Miscellaneous Section	Anything you can't find a home for in the other sections goes here but don't let it become a junk drawer!