

# IMPORTANT DOCUMENTS CHECKLIST

Be Prepared for any emergency - Natural Disasters - Sudden Illness - Theft

LOCATIONS						
	Bank Safety Deposit Box	Home File Cabinet (Preferably Fireproof)	Lawyer's Office	Broker/ Bank	Home/ Location	Other
<b>PROOF OF IDENTIFICATION AND RELATIONSHIPS</b>						
Social Security Card						
Birth Certificate						
Marriage Certificate						
Armed Forces Discharge Papers						
Passport						
Pre-Nuptual Agreement						
Divorce Certificate						
Divorce Settlement						
Adoption papers						
Naturalization or Residency Papers						
Genealogy						
Copy of your Drivers License						
<b>TITLES OR DEEDS TO ANY PROPERTY</b>						
Real Estate						
Burial Plot Papers						
Motor Vehicles						
Boats						
Campers						
<b>ADVANCE DIRECTIVES</b>						
Power of Attorney for Health Care						
Living Will						
Organ Donor Information						
Do no Resuscitate Order (DNR)						
Any Pre-Paid Funeral Statements						

## LOCATIONS

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<b>INSURANCE POLICIES</b>						
Life Insurance						
Homeowners Insurance						
Auto Insurance						
Long term care Insurance						
Disability						
Umbrella Liability Policy						
Agent's Name and Telephone Number						
<b>FINANCIAL ACCOUNTS</b>						
Brokerage Statement						
Retirement accounts						
Certificate of Deposits						
IRAs						
Bank Accounts						
US Savings Bonds						
Annuities						
Deferred Compensation Papers						
Inventory of Assets						
Partnership Agreement						
Outstanding Loans (Either owed by you or to you)						
Credit Card Accounts						
Will						
Durable Power of Attorney						
Trust Documents						
Safety Deposit Box Location						
Safety Deposit Box Key						
Personal Computer Location						
Location of Personal Computer Password						
<b>Tax Documents</b>						
Tax Returns for the last year						
Recent pay stub and W-2						
Estimated taxes (Paid and still owed)						

### NAME AND CONTACT OF DOCTORS

Name	Phone	Address
Name	Phone	Address
Name	Phone	Address

### MEDICATIONS

Name	Prescription Number
Name	Prescription Number
Name	Prescription Number

## BANK STATEMENTS

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### MONTHLY BILLS

ACCOUNT NUMBER	PAYABLE TO	AMOUNT	DUE DATE

### ALL ONLINE ACCOUNTS (IMPORTANT TO KEEP CURRENT)

ACCOUNT (EX. AMAZON, INVEST. ACCOUNTS, ONLINE BANKING...)	USERNAME	PASSWORD