

Checklist of Important Documents

Use this form to locate each of the following items that apply to your situation.

Document	Where to Find It	Notes
Health Insurance Policies		
<input type="checkbox"/> Primary Health Insurance		
<input type="checkbox"/> Supplemental Medical Insurance		
<input type="checkbox"/> Medicare Card		
<input type="checkbox"/> Long-Term Care Insurance		
<input type="checkbox"/> Disability Insurance/ Life Insurance (Agent, Beneficiaries)		
<input type="checkbox"/> Funeral Insurance Policy		
Financial Accounts & Valuables		
<input type="checkbox"/> Safe-Deposit Box & Keys		
<input type="checkbox"/> Checking & Savings Accounts		
<input type="checkbox"/> Brokerage Accounts		
<input type="checkbox"/> Stocks & Bonds		
<input type="checkbox"/> Jewelry/Coins		
<input type="checkbox"/> Appraisals & Inventory Lists		
Retirement & Benefit Plans		
<input type="checkbox"/> 401k Plans		
<input type="checkbox"/> Profit Sharing/Pension Plans		
<input type="checkbox"/> IRA Accounts		
<input type="checkbox"/> Military Benefits/ Records		
<input type="checkbox"/> Social Security Records		

Checklist of Important Documents *(cont.)*

Document	Where to Find It	Notes
Debt		
<input type="checkbox"/> Credit Cards		
<input type="checkbox"/> Outstanding Bills/Loans		
Taxes		
<input type="checkbox"/> Annual Income Tax Records		
<input type="checkbox"/> Property Tax Records		
Personal Legal Documents		
<input type="checkbox"/> Birth Certificate		
<input type="checkbox"/> Passport		
<input type="checkbox"/> Citizenship Papers (if applicable)		
<input type="checkbox"/> Marriage Certificate/ Divorce Records		
<input type="checkbox"/> Will and/or Trust		
Other Legal Documents		
<input type="checkbox"/> Contracts/Partnership Agreements		
<input type="checkbox"/> Deed to House		
<input type="checkbox"/> Mortgage (or Rental Lease)		
<input type="checkbox"/> Homeowner's Insurance		
<input type="checkbox"/> Automobile Title		
<input type="checkbox"/> Automobile Insurance		
<input type="checkbox"/> Driver's License		
<input type="checkbox"/> Burial Plot Information/ Deed		

Checklist of Important Documents *(cont.)*

Legal & Financial Advisers

Accountant Name

Address

Phone

Attorney Name

Address

Phone.....

Executor/Trustee Name

Address

Phone

Co-executor/Trustee Name (if any)

Address

Phone

Other

Address

Phone