

Keep It Together!

Securing life's most important information in one location will ensure that it is accessible to you and your loved ones.

PERSONAL INFORMATION

- Adoption Records
- Birth Certificate
- Death Certificate of Deceased Spouse
- Divorce Decree
- Guardianship Documents
- Marriage License
- Passport
- Proof of Citizenship
- Social Security Card
- Family Tree

TAXES

- Last Income Tax Return Filed
- Gift Tax Return(s)
- Name of Accountant

INSURANCE & RETIREMENT

- Annuity Contracts
- Homeowner's, Auto & Umbrella Policies
- Life Insurance Policies
- Long Term Care Insurance Policy
- Name of Insurance Agent
- IRA
- 401(k)
- Pension

HEALTH INFORMATION

- Health Insurance Carrier
- Medicare Card
- Personal & Family Medical History

FINANCIAL INFORMATION

- Bank Accounts - bank names/acct. numbers
- Brokerage Account
- Certificates of Deposit (CDs)
- Mutual Funds
- Stock Certificates
- Savings Bonds & Location of Originals
- Safe Deposit Box & Location/Key & Box No.
- Trust-Owned Bank Accounts

ESTATE PLANNING

- Health Care Proxy/Living Will
- Power of Attorney/Statutory Gifts Rider
- HIPAA Authorization
- Last Will & Testament
- Trust Agreements
- Prenuptial/Antenuptial Agreement(s)
- Letters of Instruction
- Disposition of Remains Instructions
- Funeral & Burial Arrangements
- Cemetery Deed/Burial Plot
- Name of Attorney

MILITARY DOCUMENTS

- Honorable Discharge Certificate
- Military Information/Branch
- VA Pensions
- VA Aid & Attendance Award Letter
- Veteran ID Card

REAL ESTATE & PERSONAL PROPERTY

- Property Deeds
(maps/surveys/abstracts/title insurance)
- Mortgage Documents
- Rent Roll
- Time Share Records
- Title/Registration/Lease for Vehicles

EXPENSES & ELECTRONIC INFORMATION

- Monthly Household Expenses
- Online Accounts (user names & passwords)
- Bills Automatically Deducted from Bank (accounts, online bill-pay & access information)
- Cell Phone Numbers (carrier, voice mail & passwords)
- Loans Made/Debts Owed/Promissory Note
- Social Media Accounts & Passwords

BUSINESS OWNERSHIP

- Partnership & Corporate Documents

FAMILY DOCUMENTS