

List of Important Documents

	Location	Date of update
Insurance Policies		
Primary Health Insurance	_____	_____
Supplemental Medical Insurance	_____	_____
Medicare Card	_____	_____
Long Term Care Insurance	_____	_____
Disability Insurance	_____	_____
Life Insurance (Agent, Beneficiaries)	_____	_____
Funeral Insurance Policy	_____	_____
Bank & Brokerage Accounts and Valuables		
Safety Deposit Box and Keys	_____	_____
	_____	_____
Check Register and Savings Books	_____	_____
	_____	_____
	_____	_____
Brokerage Accounts, Names & Numbers	_____	_____
	_____	_____
	_____	_____
	_____	_____
Stocks and Bonds	_____	_____
	_____	_____
	_____	_____
Jewelry/Coins	_____	_____
Appraisals and Inventory Lists	_____	_____
	_____	_____
Retirement and Benefit Plans		
401k Plans	_____	_____
Profit Sharing/Pension Plans	_____	_____
IRA Accounts	_____	_____
Military Benefits/Records	_____	_____
Social Security Records	_____	_____
	_____	_____

	Location	Date of update
Debt		
Credit Cards	_____	_____
Outstanding Bills/Loans	_____	_____
Personal Legal Documents		
Birth Certificate	_____	_____
Passport	_____	_____
Citizenship Papers	_____	_____
Marriage Certificate/Divorce Records	_____	_____
Will	_____	_____
Other Legal Documents		
Contracts	_____	_____
Partnership Agreements	_____	_____
Deed to House	_____	_____
Mortgage (or rental lease)	_____	_____
Homeowners Insurance	_____	_____
Automobile Title	_____	_____
Auto Insurance	_____	_____
Drivers License	_____	_____
Taxes		
Annual Income Tax Records	_____	_____
Property Tax Records	_____	_____
Legal and Financial Advisors		
Accountant Name:	_____	_____
Phone:	_____	_____
Attorney Name:	_____	_____
Phone:	_____	_____
Executor/Trustee Name:	_____	_____
Phone:	_____	_____
Other:	_____	_____
Phone:	_____	_____