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**FAMILY DOCUMENTS CHECKLIST**

This family documents checklist is a good starting point. Make any necessary additions and skip items that don't apply. You should make sure the items on the list are easy to find, ideally organized in a fireproof filing cabinet or home safe. Complete the checklist listing locations and comments for each item and send copies to the executor of your estate and to key family members.

**° EMERGENCY PAPERS AND INFORMATION**

- Organ donor/  
anatomical gift statement \_\_\_\_\_
- Burial instructions, cemetery plot, deed, prepaid cremation  
documents, preferences of funeral home, cremation or burial  
donations \_\_\_\_\_
- Key adviser and contact  
phone numbers, addresses \_\_\_\_\_
- Lawyer, stockbroker,  
financial planner, etc. \_\_\_\_\_
- Last will and testament \_\_\_\_\_
- Living will/health care proxy \_\_\_\_\_
- Military discharge  
papers and other records \_\_\_\_\_
- Powers of attorney/  
durable powers of attorney \_\_\_\_\_
- Safe and combination \_\_\_\_\_
- Safe deposit box and keys \_\_\_\_\_

**° NONFINANCIAL PERSONAL PAPERS**

- Adoption Papers \_\_\_\_\_
- Birth Certificate \_\_\_\_\_
- Citizenship or naturalization papers \_\_\_\_\_
- Divorce/separation papers \_\_\_\_\_
- Marriage certificate, prenuptial agreement \_\_\_\_\_
- Passport number and expiration date \_\_\_\_\_
- Social Security Card \_\_\_\_\_

**° INVESTMENT DOCUMENTS**

- Annuity statements and policy documents \_\_\_\_\_
- Bearer bonds, for which coupons  
are clipped for redemption \_\_\_\_\_
- Brokerage account statements  
(include all IRAs, Keoghs, etc.) \_\_\_\_\_
- Investment club agreement \_\_\_\_\_
- Retirement plan statements \_\_\_\_\_
- Stock certificates not held in account \_\_\_\_\_

**° FINANCIAL PERSONAL PAPERS**

- Appraisal or inventory of valuables \_\_\_\_\_
- Automobile titles \_\_\_\_\_
- Buy/sell or partnership agreements \_\_\_\_\_
- Employer deferred  
compensation agreement documents \_\_\_\_\_
- Federal/state gift-tax returns \_\_\_\_\_
- Income-tax returns from prior years \_\_\_\_\_
- Lawsuit or legal-actions pending documents \_\_\_\_\_
- Loans outstanding or debts  
owed to you (promissory notes) \_\_\_\_\_
- Mortgage documents \_\_\_\_\_
- Prescription plan card/records \_\_\_\_\_
- Property tax and school tax records \_\_\_\_\_
- Real estate deeds, other titles of ownership \_\_\_\_\_
- Rental or lease agreements \_\_\_\_\_
- Trust agreements \_\_\_\_\_

**° BANK AND CREDIT ACCOUNTS**

- Bank and credit union account statements and books, statements  
for individual retirement accounts, Keoghs, etc. \_\_\_\_\_
- Checks from checking or money market accounts \_\_\_\_\_
- Credit cards, account statements \_\_\_\_\_
- U.S. Savings Bonds \_\_\_\_\_

**° INSURANCE DOCUMENTS**

- Group life and retirement  
policies (booklets, certificates) \_\_\_\_\_
- Health and accident insurance  
ID cards and claim records \_\_\_\_\_
- Life insurance policy documents \_\_\_\_\_
- Mortgage insurance policy \_\_\_\_\_
- Property and casualty policy  
documents (homeowners, auto, boat, etc.) \_\_\_\_\_
- Travel insurance policies \_\_\_\_\_
- Veterans administration insurance papers \_\_\_\_\_