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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 _____