



# List of Important Documents

	Where to find it	Notes and updates
<b>Health Insurance Policies</b>		
Primary Health Insurance	_____	_____
Supplemental Medical Insurance	_____	_____
Medicare Card	_____	_____
Long-term Care Insurance	_____	_____
Disability Insurance	_____	_____
Life Insurance (Agent, Beneficiaries)	_____	_____
Funeral Insurance Policy	_____	_____
<b>Financial Accounts and Valuables</b>		
Safety Deposit Box and Keys	_____	_____
Checking and Savings Accounts	_____	_____
Brokerage Accounts	_____	_____
Stocks and Bonds	_____	_____
Jewelry/Coins	_____	_____
Appraisals and Inventory Lists	_____	_____
<b>Retirement and Benefit Plans</b>		
401k Plans	_____	_____
Profit Sharing/Pension Plans	_____	_____
IRA Accounts	_____	_____
Military Benefits/Records	_____	_____
Social Security Records	_____	_____
<b>Debt</b>		
Credit Cards	_____	_____
Outstanding Bills/Loans	_____	_____
<b>Taxes</b>		
Annual Income Tax Records	_____	_____
Property Tax Records	_____	_____

## LIST OF IMPORTANT DOCUMENTS

	Where to find it	Notes and updates
<b>Personal Legal Documents</b>		
Birth Certificate	_____	_____
Passport	_____	_____
Citizenship Papers	_____	_____
Marriage Certificate/Divorce Records	_____	_____
Will	_____	_____
<b>Other Legal Documents</b>		
Contracts	_____	_____
Partnership Agreements	_____	_____
Deed to House	_____	_____
Mortgage (or Rental Lease)	_____	_____
Homeowner's Insurance	_____	_____
Automobile Title	_____	_____
Automobile Insurance	_____	_____
Driver's License	_____	_____
<b>Legal and Financial Advisers</b>		
ACCOUNTANT Name:	_____	
Address:	_____	Phone: _____
ATTORNEY Name:	_____	
Address:	_____	Phone: _____
EXECUTOR/TRUSTEE Name:	_____	
Address:	_____	Phone: _____
CO-EXECUTOR/TRUSTEE Name (if any):	_____	
Address:	_____	Phone: _____
OTHER:	_____	
Address:	_____	Phone: _____

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