

It is important to ensure that valuable or hard-to-replace documents are kept in a safe place, like a safety deposit box or with your attorney. Documents that can be more easily replaced can be kept at home in a safe or fireproof box.

<u>ITEM</u>	<u>LOCATION</u>
<u>General</u>	
My Will (original and copies)	_____
Spouse's/Partner's Will	_____
Power of Attorney (healthcare)	_____
Power of Attorney (financial)	_____
Living Will	_____
DNR (Do Not Resuscitate Order)	_____
DNH (Do Not Hospitalize Order)	_____
Social Security Cards	_____
Birth Certificate	_____
Children's Birth Certificates	_____
Adoption Papers	_____
Naturalization Papers	_____
Marriage Certificate	_____
Divorce/Separation Records	_____
Military/Discharge Papers	_____
Death Certificate (multiple copies)	_____
Passport	_____
Mortgages	_____
Attorney Name/Phone	_____
<u>Financial</u>	
Accountant Name/Phone	_____
Financial Manager Name/Phone	_____
Safe Location	_____
Safe Combination	_____
List of Checking/Savings Accts.	_____
Safe Deposit Box	_____

- Safe Deposit Box Key/Number _____
- Savings Bonds _____
- Trust Agreement _____
- Pension Fund Membership _____
- Income Tax Returns – prior years _____
- Income Tax Returns – current _____
- Gift & Gift Tax Records _____
- Estate/Inheritance Tax Returns _____
- Deferred Compensation/IRA's _____
- List of Stocks/Bonds _____
- Other Investments _____
- Company Information _____
- List of Credit Cards _____

Insurance

- Insurance Agent Name/Phone _____
- Life Insurance Policy _____
- Disability Insurance Policy _____
- Health Insurance Policy/Card _____
- Secondary Health Insurance/Card _____
- Homeowner's Policy _____
- Long-Term-Care Insurance Policy _____
- Car Insurance Policy _____
- Other Insurance Policy _____
- Other Insurance Policy _____

Titles, Contracts, Misc.

- Second Home Information _____
- Other Home Information _____
- Titles/Deeds to Cars, Boat _____
- Employment Contracts _____
- Retirement Papers _____

Partnership Agreement	_____
List of Stored/Loaned items	_____
Cemetery Plot Deed	_____
Final Arrangements	_____
Uniform Donor Card	_____
Computer Passwords	_____
Pin Numbers	_____
Jewelry	_____
Jewelry	_____
Valuables	_____
Valuables	_____
Valuables	_____
Other	_____

NOTES
