

# YOUR DOCUMENT CHECKLIST

Life's emergency situations require advance preparation and planning. The first step is knowing where your documents are. **Our Document Checklist** will help you identify your important documents and where they are located. Knowing where your official records are located as well as having copies of these important financial, legal and health documents can save you countless hours of time spent tracking down records.

NAME: \_\_\_\_\_

RESIDENCE: \_\_\_\_\_

SAFE DEPOSIT BOX: \_\_\_\_\_

	RESIDENCE	SAFE DEPOSIT BOX	OFFICE	OTHER:	OTHER:	OTHER:
Will (original)						
Powers of attorney						
Burial instructions						
Spouses will (original)						
Spouses will (copy)						
Cemetery plot deed						
Doc. Appointing children's guardian						
List of special bequests						
Safe combination, business						
Safe combination, home						
Trust agreements						
Life insurance, group						
Life insurance, individual						
Property and casualty insurance						
Health insurance policy						
Homeowners insurance policy						
Partnership agreements						
List of checking and savings accts.						
Bank statements and canceled checks						
List of credit cards						
Certificate of deposits						
Checkbooks						
Savings passbook						

