

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						

	RESIDENCE	SAFE DEPOSIT BOX	OFFICE	OTHER:	OTHER:	OTHER:
Investment securities						
Brokerage account records						
Stock certificates						
Mutual fund shares						
Bonds						
Other securities						
Corporate retirement plan						
Keogh or IRA plan						
Annuity contracts						
Stock option plan						
Profit sharing plan						
Income and gift tax return						
Titles and deeds to real estate & land						
Rental property agreements						
Notes and other loan agreements, including mortgages						
Stored and valuable possessions						
Auto ownership records						
Boat ownership records						
Birth certificate						
Citizenship papers						
Adoption papers						
Military discharge papers						
Marriage certificate						
Children's birth certificates						
Divorce/separation records						
Names & addresses of relatives & friends						
Listing of professional & fraternal organization memberships						
Other:						