



SENIOR LAW SOLUTIONS^{LLC}

LIFE CARE PLANNING

FAMILY DOCUMENTS CHECKLIST

This document is a good starting point to identify any important files to be kept in a safe, fireproof location. Your trustees, and powers of attorney, and key family members should also have a copy of this information.

<p>EMERGENCY PAPERS AND INFORMATION</p> <ul style="list-style-type: none"><input type="checkbox"/> Organ donor/anatomical gift statement<input type="checkbox"/> Burial instructions, cemetery plot, deed, prepaid cremation documents, preferences of funeral home, cremation or burial donations<input type="checkbox"/> Key adviser and contact phone numbers, addresses<input type="checkbox"/> Lawyer, stockbroker, financial planner, etc.<input type="checkbox"/> Last will and testament<input type="checkbox"/> Living will/health care proxy<input type="checkbox"/> Military discharge papers and other records<input type="checkbox"/> Powers of attorney/Durable Powers of Attorney<input type="checkbox"/> Electronic Passwords<input type="checkbox"/> Safe and combination<input type="checkbox"/> Safe deposit box and keys <p><u>NONFINANCIAL PERSONAL PAPERS</u></p> <ul style="list-style-type: none"><input type="checkbox"/> Adoption Papers<input type="checkbox"/> Birth Certificate<input type="checkbox"/> Citizenship or naturalization papers<input type="checkbox"/> Divorce/separation papers<input type="checkbox"/> Marriage certificate, prenuptial agreement<input type="checkbox"/> Passport number and expiration date<input type="checkbox"/> Social Security Card <p><u>INVESTMENT DOCUMENTS</u></p> <ul style="list-style-type: none"><input type="checkbox"/> Annuity statements and policy documents<input type="checkbox"/> Bearer bonds, for which coupons are clipped for redemption<input type="checkbox"/> Brokerage account statements (include all IRAs, 401, etc.)<input type="checkbox"/> Investment club agreement<input type="checkbox"/> Retirement plan statements<input type="checkbox"/> Stock certificates not held in account	<p>FINANCIAL PERSONAL PAPERS</p> <ul style="list-style-type: none"><input type="checkbox"/> Appraisal or inventory of valuables<input type="checkbox"/> Automobile titles<input type="checkbox"/> Buy/sell or partnership agreements<input type="checkbox"/> Employer deferred compensation agreement documents<input type="checkbox"/> Federal/state gift-tax and income returns tax returns from prior years<input type="checkbox"/> Lawsuit or legal-actions pending documents<input type="checkbox"/> Loans outstanding or debts owed to you (promissory notes)<input type="checkbox"/> Mortgage documents<input type="checkbox"/> Prescription plan card/records<input type="checkbox"/> Property tax and school tax records<input type="checkbox"/> Real estate deeds, other titles of ownership<input type="checkbox"/> Rental or lease agreements<input type="checkbox"/> Trust agreements <p><u>BANK AND CREDIT ACCOUNTS</u></p> <ul style="list-style-type: none"><input type="checkbox"/> Bank and credit union account statements and books, statements for individual retirement accounts, 401k, etc.<input type="checkbox"/> Checks from checking or money market accounts<input type="checkbox"/> Credit cards, account statements<input type="checkbox"/> U.S. Savings Bonds <p><u>INSURANCE DOCUMENTS</u></p> <ul style="list-style-type: none"><input type="checkbox"/> Group life and retirement policies (booklets, certificates)<input type="checkbox"/> Health and accident insurance ID cards and claim records<input type="checkbox"/> Life insurance policy documents<input type="checkbox"/> Mortgage insurance policy<input type="checkbox"/> Property and casualty policy documents (homeowners, auto, boat, etc)<input type="checkbox"/> Travel insurance policies<input type="checkbox"/> Veterans administration insurance papers
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