



# Vital Documents Checklist - Protecting Identity + Personal Wishes

†Do not place the only copy of these documents in a safe deposit box. Safe deposit boxes cannot be easily accessed. In the event of an emergency these documents will need to be in hand. ∞These are the documents considered the most vital in their category. They should be accounted for at all times.



## Everyday Personal

VF

### PERSONAL IDENTITY

- Adoption Papers<sup>∞</sup>
- Birth Certificate<sup>†∞</sup>
- Certificate of Citizenship
- Citizenship Papers<sup>∞</sup>
- Death Certificate<sup>∞</sup>
- Deceased Family Personal Records
- Drivers License : Copy
- Family History
- Fingerprints
- Marriage Certificate
- Naturalization Certificate
- Passport : Current
- Religious Records
- Social Security Card<sup>†∞</sup>
- Selective Services Card
- Voters Registration



## Everyday Work + Professional

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### WORK - PROFESSIONAL

- Diplomas<sup>∞</sup>
- Contract - Current Work
- Employee ID
- Government Employment Records
- Government ID
- Military Employment Records
- Military ID
- Pay Stub - Last Each Job
- Pay Stub - Last Each Year
- Professional Accreditations
- Work History Summary
- W2(s) - Every Year





# Vital Documents Checklist - Protecting Wishes + Wealth

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## Wealth Financial + Tax

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### TAX

- Past Tax Returns, Payment Records & Forms∞
- Nondeductible IRA Records∞

### CASH & CREDIT

- Cash & Credit Account Summaries with Beneficiary Designations∞
- Account Opening Application
- Credit Reports Current
- Credit & Bank Cards Copy
- Letters Closing Accounts

### RETIREMENT

- Account Summaries with Beneficiary Designations∞
- Account Opening Application or Plan Agreements
- Annuity Contracts∞
- Social Security Earnings & Benefits Statements
- Pension Records
- Year-End Retirement Account Statements

### INVESTMENTS

- Account Summaries with Beneficiary Designations∞
- Account Opening Application
- Advisors Form (ADV)
- Certificates of Deposit∞
- Confirmations for Buy and Sells of Securities
- Savings Bonds∞
- Stock Certificates∞
- Stock Option Grant Agreements
- Treasury Securities∞
- Year-End Investment Statements



## Wealth Legal + Insurance

VF

### LIFE, DISABILITY & LONG TERM CARE

#### INSURANCE

- Life, Disability & Long Term Care Policies ∞
- Life, Disability & Long Term Care Application
- Life, Disability & Long Term Care Policy Summaries with Beneficiary Designations∞

#### LEGAL + FINANCIAL

- Advisor Summaries with Contact Information∞
- Custody Agreements
- Divorce Decree
- Kids Legal Guardianship Documents†∞
- Power of Attorney Financial†∞
- Letter of Instruction or Intent†∞
- Pour Over Will†∞
- Pre/Post Nuptial Agreement
- Revocable Living Trust†∞
- Will†∞



## Vital Documents Checklist - Personal Wishes + Wellness

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### Wellness Loved One

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#### PERSONAL

- Family Medical History<sup>†</sup>
- Personal Medical History<sup>†</sup>
- Vaccination History<sup>†</sup>

#### PET

- Pet AKA Records
- Pet Medical History



### Wellness Legal + Insurance

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#### LEGAL + INSURANCE

- Advanced Directive<sup>†∞</sup>
- Organ Donor Card Copy<sup>†</sup>
- Health Insurance Policies<sup>∞</sup>
- Health Insurance Policy Summaries<sup>∞</sup>
- Health Insurance Cards Copy<sup>†</sup>
- Power of Attorney Medical<sup>†∞</sup>
- Organ, Tissue and Body Donation<sup>†∞</sup>





# Vital Documents Checklist - Protecting Ownership

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## Home

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### Inventory + Improvement

#### OWNERSHIP

- Asset Summary Current∞
- Appraisals
- Safety Deposit Contents∞

#### HOME IMPROVEMENT

- Receipts for Major Mechanicals
- Contractor Invoices + Contracts
- Permit + Inspection Documents

#### INVENTORY

- Receipts for Big Ticket Items
- Photos/Video
- Room Inventory List Current∞



## Home

VF

### Ownership

#### HOME

##### LEGAL + INSURANCE + FINANCIAL,

- Account Summaries Mortgages & Loans∞
- Account Opening Application
- Co-ownership Property Agreement
- Homeowners Insurance Policies∞
- Homeowners Insurance Policy Summaries∞
- Loan | Mortgage Payoff Notices∞
- Promissory Note
- Survey
- Settlement Statement
- Title | Deed∞
- Title Insurance Certificate∞
- Lease or Rent Agreements
- Renters** - Receipt and Copy Of Your Canceled Check (First + Last Months' Security Deposit)

#### VEHICLE

##### LEGAL + INSURANCE + FINANCIAL

- Account Summaries Vehicle Loans∞
- Vehicle Insurance Policies∞
- Vehicle Insurance Policy Summaries∞
- Vehicle Insurance Card Copy
- Lease Agreements
- Loan Payoff Notices∞
- Title∞

