

Vital Document Check

This checklist will help you identify and collect the documents considered vital.

† 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.

Financial & Legal Records

- Custody Agreements
- Divorce Decree
- Power of Attorney : Financial ∞
- Lease or Rent Agreements
- Marriage Certificate
- Pour Over Will †∞
- Pre/Post Nuptial Agreement

Genealogy Records

- Family History
- Deceased Family Personal Records

Personal Records Kids Records

- Adoption Papers ∞
- Birth Certificate ∞
- Citizenship Papers ∞
- Diplomas ∞
- Death Certificate ∞
- Drivers License : Copy Both Sides
- Fingerprints
- Passport
- Religious Records
- Social Security Card ∞

Pet Records

- AKA Records
- Pet Medical History

Cash & Credit Records

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

Life, Disability & Long Term Records

- Current Policies ∞
- Policy Application
- Policy Summaries with Beneficiary Designations ∞

Tax Records

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

Work Records

- Current Work Contract
- Last Pay Stub : Each Job
- Professional Accreditations
- Military Records or Government Employment Records
- Work History Summary

Health Records

- Advanced Directive †∞
- Power of Attorney : Medical †∞
- Family Medical History †
- Organ Donor Card †
- Personal Medical History †
- Vaccination History †
- Current Account Applications
- Current Policy Summaries †∞
- Insurance Cards : Copy Both Sides †

Retirement Records

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

Home Inventory Records

- Asset Summary : Current ∞
- Appraisals
- Contents of Safety Deposit Box
- Large Purchase Receipts
- Photos/Video
- Room Inventories : Current ∞

Home Records

- Account Summaries : Mortgages and Home Equity ∞
- Account Opening Application
- Co-ownership Property Agreement
- Deed ∞
- Insurance Policies ∞
- Insurance Policy Summaries
- Loan Payoff Notices ∞
- Mortgage Payoff Notices ∞
- Promissory Note
- Survey
- Title ∞

Vehicle Records

- Account Summaries : Car Loans ∞
- Account Opening Application
- Insurance Policies ∞
- Insurance Card : Copy Both Sides
- Insurance Policy Summaries ∞
- Lease Agreements
- Loan Payoff Notices ∞
- Title ∞

Investment Records

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