

## Important Papers Checklist

*Security is a warm calm feeling. There are many ways of protecting yourself and your loved ones. One way is making sure your affairs are in order.*

*Getting your affairs in order could be as simple as preparing a listing of where you keep your important papers. Other ways would be to make sure you have an updated will, health care proxy and living will. Following is a checklist where you could enter where you keep your important papers, and at the same time it could be used as a checklist of some things that you should have.*

Prepared by: _____ Date prepared: _____	Comments	Location
Your Will		
Spouse's Will		
Power of Attorney		
Living Will and Health Care Proxy		
Funeral arrangements		
Birth Certificates		
Marriage License		
Divorce Papers		
Passports		
Military Discharge		
Family Tree		
Other personal info (e.g. blood type, medical history)		
Real Estate Closing Contracts		
Mortgage Payable		
Notes Payable		
Deeds & Title Insurance		
Automobile Title(s)		
Jewelry, art and collectibles bills of sale		
Jewelry, art and collectibles location		
Safe Deposit Box Location		
Stock Certificates		
Bonds		
Stock Options		
Stock Purchase Agreements		
Checking Account Documents		
Savings Passbooks		

Certificates of Deposit		
Notes Receivable		
Life Insurance Policies		
Disability Insurance Policies		
Medical Insurance Policies and Coverage Information		
Insurance Policies – Other		
Partnership and/or Corporate Agreements		
Employment Contracts		
Retirement Agreements		
IRA documents including the designation of beneficiary forms		
Pension Plan Documents		
Profit Sharing Plan Documents		
Deferred Compensation Agreements		
Income Tax Returns		
Gift Tax Returns		
Trust Documents		
Financial Plans		
Pending Contracts		
Digital assets and passwords		
People to call: Accountant Attorney Banker Broker or financial planning Insurance Agent People to consider selling my collectibles to		