

DOCUMENT CHECKLIST

Keep these important items together and organized for easy access in times of need. As your Household Document Binder is assembled, check off the items that are inside and make a note of items you need to acquire.

PERSONAL

- ☐ Birth Certificates
- ☐ Social Security Cards
- ☐ Driver's License Copy
- ☐ Passports
- ☐ Military Records
- ☐ Emergency ID Cards
- ☐ Diplomas
- ☐ Transcripts

CONTACT

- ☐ Emergency Services
- ☐ Family
- ☐ Doctor/Pharmacy
- ☐ Work/School/Daycare
- ☐ Friends/Neighbors
- ☐ Utilities
- ☐ Church/Pastor
- ☐ Attorney/Banker

MEDICAL

- ☐ Health Ins. Policy
- ☐ Adv. Care Directives
- ☐ Medical History
- ☐ Immunizations
- ☐ Prescriptions
- ☐ Disability Ins. Policy
- ☐ Dental Ins. Policy
- ☐ Vision Ins. Policy

TESTAMENTARY

- ☐ Trust
- ☐ Living Will
- ☐ Last Will
- ☐ Power of Attorney
- ☐ Letter of Testamentary
- ☐ Estate Plans
- ☐ Heir Contact #s
- ☐ Any Coidils

PROPERTY

- ☐ Deeds/Titles
- ☐ Abstract Summary
- ☐ Appraisals
- ☐ Assets Inventory
- ☐ Vehicle Registration
- ☐ Homeowner's Policy
- ☐ Auto Ins. Policy
- ☐ Receipts/Bill of Sale

TAX & BANKING

- ☐ Tax Returns
- ☐ Investment Plans
- ☐ Stock Certificates
- ☐ Bonds/CDs
- ☐ Prop. Tax Statements
- ☐ Bank Statements
- ☐ Employment Forms
- ☐ Account/Card #s

LEGAL

- ☐ Marriage Certificate
- ☐ Proof of Residency
- ☐ Adoption Papers
- ☐ Contracts
- ☐ Court Records
- ☐ Custody Agreements
- ☐ _____
- ☐ _____

OTHER

- ☐ Emergency Plans
- ☐ Cash
- ☐ Local Maps
- ☐ Family Photos
- ☐ Gun serial #/reg.
- ☐ Files on Flash Drive
- ☐ _____
- ☐ _____