

## IMPORTANT DOCUMENTS CHECKLIST

| Stored | Scanned | Cloud | Personal Identifier Documents                                    |
|--------|---------|-------|------------------------------------------------------------------|
|        |         |       | Birth Certificates                                               |
|        |         |       | Concealed carry license                                          |
|        |         |       | Driver's License                                                 |
|        |         |       | Back-up ID (student ID, military, DD214, etc.)                   |
|        |         |       | Passports / Visas                                                |
|        |         |       | Marriage License                                                 |
|        |         |       | Military & VA records                                            |
|        |         |       | Social Security Card / Proof of Citizenship                      |
|        |         |       | Church Documents (minster's license, patriarchal blessing, etc.) |
|        |         |       | <b>Insurance Documents</b>                                       |
|        |         |       | Car insurance documents                                          |
|        |         |       | Car registration                                                 |
|        |         |       | Extra vehicle keys (or key replacement ID)                       |
|        |         |       | Health & Dental insurance documents / cards                      |
|        |         |       | HSA Account information & card                                   |
|        |         |       | Medical records / prescriptions                                  |
|        |         |       | Disability & Liability Insurance                                 |
|        |         |       | Homeowners or renters insurance documents                        |
|        |         |       | <b>Estate Planning Documents</b>                                 |
|        |         |       | Titles / Deeds / Etc.                                            |
|        |         |       | Will / Trust documents                                           |
|        |         |       | Prepaid funeral & burial arrangements                            |
|        |         |       | Power of attorney                                                |
|        |         |       | Survivor benefits                                                |
|        |         |       | Organ donation                                                   |
|        |         |       | Court rulings                                                    |
|        |         |       | <b>Accounts</b>                                                  |
|        |         |       | Credit Cards statement (w/ phone number of card issuers)         |
|        |         |       | Bank account statements                                          |
|        |         |       | Loan statements                                                  |
|        |         |       | Leases & Contracts                                               |
|        |         |       | Investment statements                                            |
|        |         |       | List of passwords for online accounts                            |

## IMPORTANT DOCUMENTS CHECKLIST CONTINUED

| Stored | Scanned | Cloud | Education & Work Documents                                                                                                                                                                                                       |
|--------|---------|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|        |         |       | Employment records / retirement / pension                                                                                                                                                                                        |
|        |         |       | Diplomas, GED or Certifications                                                                                                                                                                                                  |
|        |         |       | School Transcripts                                                                                                                                                                                                               |
|        |         |       | College ID (replacement or copy)                                                                                                                                                                                                 |
|        |         |       | Resume                                                                                                                                                                                                                           |
|        |         |       | Paycheck stubs                                                                                                                                                                                                                   |
|        |         |       | Tax returns (last 2 years)                                                                                                                                                                                                       |
|        |         |       | Important phone numbers                                                                                                                                                                                                          |
|        |         |       | <b>Additional Assets</b>                                                                                                                                                                                                         |
|        |         |       | Gun receipts & transfers                                                                                                                                                                                                         |
|        |         |       | Appraisals (jewelry, art, antiques, coins, guns)                                                                                                                                                                                 |
|        |         |       | Specialty bicycles or other sporting equipment                                                                                                                                                                                   |
|        |         |       | Business ID records                                                                                                                                                                                                              |
|        |         |       | Royalties & Copyrights                                                                                                                                                                                                           |
|        |         |       | Heirloom Documentation                                                                                                                                                                                                           |
|        |         |       | Hobby Log (inventory of collections & receipts of large purchases)                                                                                                                                                               |
|        |         |       | Pet records (license, vet records, vaccine information) - anything needed for boarding/travel                                                                                                                                    |
|        |         |       | <b>Other Items / Considerations</b>                                                                                                                                                                                              |
|        |         |       | Thumb drive with video of house and all contents (video all rooms, drawers & closets with contents, basement, garage, and attic including artwork, collections, etc.) - store copy in safe and with trusted family member/friend |
|        |         |       | Home safe (fireproof & waterproof)                                                                                                                                                                                               |
|        |         |       | Safety deposit box                                                                                                                                                                                                               |