

# Finding the Documents you Need

for: \_\_\_\_\_

Fill out the form below, indicating the various places that you keep your documents. On the following page indicate where the document is located by putting a letter or letter/number combination on the provided line (ex: A1 means this document is in my home wherever I indicated on line 1. If it's located in my Death Binder put a B on the line, and so on...

Full name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Social security number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Spouse's/Partner's name: \_\_\_\_\_

Spouse's/Partner's Date of Birth: \_\_\_\_\_

Spouse's/Partner's social security number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

A: **In the Home** (places documents are located; ex: filing cabinet in office, lock box under bed...)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

B: **Death Binder**

Death Binder is located: \_\_\_\_\_

C: **Safety deposit box**

Box number \_\_\_\_\_

Location of key: \_\_\_\_\_

Bank name: \_\_\_\_\_

Bank address: \_\_\_\_\_

D: **Outside of the Home** (ex: attorney's office, child's home, etc)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Additional notes:

**Burial plans & Final preparations**

- Funeral home information \_\_\_\_\_
- Burial/cremation instructions \_\_\_\_\_
- Deed for cemetery plot \_\_\_\_\_
- Memorial service/funeral wishes \_\_\_\_\_
- Obituary ideas/draft \_\_\_\_\_

After death: family should obtain  
copies of death certificate (multiple copies, perhaps up to 10)

**Health care documents**

- Health insurance information \_\_\_\_\_
- Health Care Proxy \_\_\_\_\_
- MOLST FORM \_\_\_\_\_
- Five Wishes (or similar document) \_\_\_\_\_
- List of physicians' w/specialty \_\_\_\_\_  
(w/addresses & phone numbers)
- List of allergies \_\_\_\_\_
- List of any health diagnosis \_\_\_\_\_
- List of procedures with dates \_\_\_\_\_  
(ex: colonoscopy, mammogram, MRI)
- List of surgical history \_\_\_\_\_
- Organ/body donor information \_\_\_\_\_
- Family medical history \_\_\_\_\_

**Financial Accounts** – include recent statements for all accounts and the list of Beneficiaries

- Bank statements \_\_\_\_\_
- Checking/savings accounts \_\_\_\_\_  
(and financial institution information)
- Credit cards info. Including: numbers, \_\_\_\_\_  
issuers information, balances & due dates

**Financial Accounts (cont.)**

List of regular bills paid and contact \_\_\_\_\_

Info for each company (utility co., phone, cable, internet, cell phone, water/sewage, car ins., etc)

On-line automatic bill payments \_\_\_\_\_

w/ date of withdrawal \_\_\_\_\_

Investment accounts (401k, IRA, etc) \_\_\_\_\_

Stocks and Bond certificates \_\_\_\_\_

**Other Financial Records**

Employer/retirement benefit(pension) plans \_\_\_\_\_

Veterans' benefit records \_\_\_\_\_

Disability payment documents \_\_\_\_\_

Income statements \_\_\_\_\_

(Social security, employment, other)

Loan papers \_\_\_\_\_

Tax returns \_\_\_\_\_

Documents for tax returns \_\_\_\_\_

(property tax records, bank 1099's, etc)

**Household/Property/Possessions documents**

Deed and abstract for home \_\_\_\_\_

Mortgage paperwork \_\_\_\_\_

Title insurance policy \_\_\_\_\_

Rental property documents \_\_\_\_\_

Name & contract for storage unit \_\_\_\_\_

List of valuable possessions & location \_\_\_\_\_

(could also be pictures)

Auto ownership records \_\_\_\_\_

Auto insurance policy \_\_\_\_\_

Other vehicle (\_\_\_\_\_) records \_\_\_\_\_

Other vehicle (\_\_\_\_\_) records \_\_\_\_\_

Other vehicle (\_\_\_\_\_) records \_\_\_\_\_

**Insurance policies**

- Health insurance policy \_\_\_\_\_
- Long term Health insurance policy \_\_\_\_\_
- Other death benefits \_\_\_\_\_
- Life insurance policy \_\_\_\_\_
- Homeowner's or renter's insurance policy \_\_\_\_\_
- Home and valuable possessions inventory \_\_\_\_\_
- Property/casualty/flood insurance policy \_\_\_\_\_
- Vehicle insurance policy (auto, boat, camper) \_\_\_\_\_

**Legal information**

- My will (original) \_\_\_\_\_
- My will (copy) \_\_\_\_\_
- Spouse's/Partner's will (original) \_\_\_\_\_
- Spouse's/Partner's will (copy) \_\_\_\_\_
- Power of attorney agreement \_\_\_\_\_
- Birth certificates \_\_\_\_\_
- Adoption records \_\_\_\_\_
- Business ownership documents \_\_\_\_\_
- Divorce/separation papers \_\_\_\_\_
- Driver's license (copy of) \_\_\_\_\_
- Employment information \_\_\_\_\_
- Marriage certificate \_\_\_\_\_
- Military service papers \_\_\_\_\_
  - Including discharge records
- Names & contact information of \_\_\_\_\_
  - lawyers, accountants, financial advisor, etc
- Passport, citizenship, immigration \_\_\_\_\_
  - registration papers
- Social security cards \_\_\_\_\_

**Personal information**

Names and contact information \_\_\_\_\_  
of closest family and friends

Names of organization with memberships \_\_\_\_\_

Personal history documents \_\_\_\_\_

Pet information/records \_\_\_\_\_

**Username & Passwords (including security questions and answers if applicable)**

Bank accounts \_\_\_\_\_

Cell phone(s) \_\_\_\_\_

Credit card account \_\_\_\_\_

Email accounts \_\_\_\_\_

On-line bill payments \_\_\_\_\_

Portals for health care \_\_\_\_\_  
(hospital, dr's offices)

Social media accounts \_\_\_\_\_

**Miscellaneous**

Manuals \_\_\_\_\_

Receipts \_\_\_\_\_

Warranties \_\_\_\_\_

Additional notes: