

CRITICAL DOCUMENTS

Key Contacts

Phone or Email

Physician	
Physician	
Attorney	
CPA/Accountant	
Investment Broker	

General Items

Location

Birth Certificate	
Divorce Papers	
Drivers License - copy	
Marriage Certificate	
Passport	
Safe and Combination	
Safe Deposit Box(es) and key(s)	
Social Security Card	

Emergency Papers

Location

Beneficiary Forms for IRAs, 401(k)s, etc	
Burial Instructions	
Cemetery Plot Deed	
Charitable Donation Preferences	
Durable Power of Attorney	
Financial Institution's Proprietary Power of Attorney	
Funeral Home Information	
Last Will and Testament	
Living Will/Health Care Proxy	
Pre-paid Cemetery or Funeral documents	

Other Documents

Location

Banking - checks-credit cards-passbook savings	
Life Insurance Policy	
Long-Term Care Insurance Policy	
Medical Bills, Prescription Plan Cards/Records	
Mortgage Documents	
Motor Vehicle Title Papers	
Tax Returns (past 3 years)	
Rental or Lease Agreements	