

# Checklist of Important Documents to Have in Order



## What Exactly Is an "Important Document"?

The answer to this question may be different for every family. The following lists can help you decide what is important for you. Remember, this is a starting place. You may have other information to add. For example, if you have a pet, you will want to include the name and address of your vet. Keep these documents secure, but available. They can be kept in a Safety Deposit box or a fire-safe box at an adult child's home.

### Personal Records

- ✓ Full legal name
- ✓ Social Security number
- ✓ Legal residence
- ✓ Date and place of birth
- ✓ Names and addresses of spouse and children
- ✓ Location of birth and death certificates and certificates of marriage, divorce, citizenship, and adoption
- ✓ Employers and dates of employment
- ✓ Education and military records
- ✓ Names and phone numbers of religious contacts
- ✓ Memberships in groups and awards received
- ✓ Names and phone numbers of close friends, relatives, and lawyer or financial advisor
- ✓ Names and phone numbers of doctors
- ✓ Medications taken regularly
- ✓ Location of living will

### Financial Records

- ✓ Sources of income and assets (retirement funds, IRAs, 401(k)s, interest, etc.)
- ✓ Social Security and Medicare information
- ✓ Insurance information (life, health, long-term care, home, car) with policy numbers and agents' names and phone numbers
- ✓ Names of your banks and account numbers (checking, savings, credit union)
- ✓ Investment income (stocks, bonds, property) and stockbrokers' names and phone numbers
- ✓ Copy of most recent income tax return
- ✓ Location of most up-to-date will with an original signature
- ✓ Liabilities, including property tax—what is owed, to whom, when payments are due
- ✓ Mortgages and debts—how and when paid
- ✓ Location of original deed of trust for home and car title and registration
- ✓ Credit and debit card names and numbers
- ✓ Location of safe deposit box and key

Source: <http://www.nia.nih.gov/HealthInformation/Publications/affairs.htm>

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