



Essential Document and Personal Organization Services

Below is an example of essential documents, but is not all inclusive. Documents that should be maintained are based upon individual circumstances.

Sample List of Documents:

Financial

- Bank account statements
- Savings bonds
- Stock certificates
- Brokerage account statements
- Online financial accounts
- Pension documents
- Annuity contracts
- Tax Returns
- Property deeds
- Car leases
- Car title
- Documentation of loans and debts including credit card accounts
- Durable financial power-of-attorney (financial proxy)
- List of all auto deposits/payments

Health Care

- Health care proxy (durable health power-of-attorney)
- Authorization to release health-care information
- Living will (healthcare directive)
- Personal medical history
- Insurance card (Medicare, Medicaid, Supplemental, Drug)
- Long-term care insurance policy

End-of-Life and Estate Planning

- Will
- Trust documents
- Life insurance policies
- End of life instructions letter (wishes or items not covered in will; ie, memorial)
- Organ donor card
- Burial plots and desired funeral arrangements

Other Must-Have Documents

Marriage papers
Divorce papers
Receipts and appraisals for valuables
Military records
Birth certificate
Driver's license
Social Security card
Passport
Voting registration
Patents

Must-Have Lists

Online usernames and passwords (including email accounts, online accounts/websites, and Social Media)
PIN if you lock your cell phone or mobile devices
Safe deposit boxes and location of keys
Trusted Advisors (clergy members, attorney, financial and tax advisors, insurance agents)
Professional memberships and renewal information
Magazine subscriptions
Frequent flyer accounts
Beneficiaries and their contact information
List of medications
Information on any Collectibles (coins, stamps, art, etc)
Magazine and newspaper subscriptions

Miscellaneous Documents

Baptismal certificates
Employment records
Academic records
Equipment warranties

Janet Parkhurst

Professional Financial Organizer

Janet@SWFL SilverSolutions.com | www.SWFLSilverSolutions.com

239-596-8966



Here to Help Make Your Life Easier and More Organized!