



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
- Checks
- Savings bonds
- Credit card statements
- Stock certificates
- Brokerage account statements
- Online financial accounts
- Pension documents
- Annuity contracts
- Tax returns and audit reports
- Property deeds
- Car leases
- Car title
- Documentation of loans and debts including credit card accounts
- Durable financial power-of-attorney (financial proxy)

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

Adoption papers
Marriage papers
Divorce papers
Custody agreements
Receipts and appraisals for valuables
Military records
Birth certificate
Driver's license
Social Security card
Passport and citizenship papers
Voting registration
Professional Licenses
Contracts and leases
Patents
Baptismal certificates
Employment and education records
Academic records
Appliance and equipment manuals and warranties
Pictures or video of home and household contents, including serial numbers for all electronics (updated annually)

Must-Have Lists

Home purchase price and date + list of improvements with dates, amounts, receipts
List of all auto deposits/payments
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 box contents and location of keys
Trusted Advisors (clergy members, attorney, financial & tax advisors, insurance agents)
Professional memberships and renewal information
Magazine subscriptions
Frequent flyer accounts
Beneficiaries and their contact information
List of medications
Roth IRA and 529 Plan contributions and dates
Service contracts
Information on any Collectibles (coins, stamps, art, etc)
Magazine and newspaper subscriptions