

# DOCUMENTS CHECKLIST

Gather your official, financial, and legal documents and let your spouse, key family member(s), personal representative, or executor know where they are located for easy access/retrieval.

<b>Documents</b>	<b>Physical Location of Originals</b> <i>(and/or name of hard drive location of computer file)</i>	<b>Location of copies</b> <i>(if applicable) or names of people who have copies with date given</i>
<b>5 Wishes Document</b> <i>(if applicable)</i> <a href="http://www.agingwithdignity.org">www.agingwithdignity.org</a> <i>(See page 30)</i>		
<b>This "Legacy Organizer" manual</b>		
<b>Automobile Titles</b>		
<b>Birth Certificates or Adoption papers</b>		
<b>Business Agreements</b>		
<b>Business or Partnership Agreements</b>		
<b>Citizenship Papers</b>		
<b>Death Certificates</b>		
<b>Debt/Loan Certificates</b>		
<b>Deeds</b>		
<b>Disability Insurance Policies</b>		
<b>Divorce/Separation Papers</b> <i>(if applicable)</i>		
<b>Employee Life Insurance Policies</b>		
<b>Financial account numbers</b>		
<b>Financial/Bank/Inv. Statements</b>		
<b>Funeral instructions</b>		
<b>Home &amp; Vehicle Insurance Policies</b>		
<b>Leases</b>		
<b>Life Insurance Policies</b>		
<b>Marriage Certificates</b>		
<b>Medical Power of Attorney</b>		
<b>Memos/Instructions about distribution of personal, sentimental, or heirloom possessions</b>		
<b>Military Discharge Papers</b>		
<b>Mortgages</b>		
<b>Partnerships</b>		
<b>Passports</b>		
<b>Past Income Tax Returns</b>		
<b>Personal address book</b>		
<b>Personal Financial Statement</b>		
<b>Power of Attorney</b>		
<b>Pre-paid funeral arrangements</b>		
<b>Recreational Vehicle/Equip Titles</b>		
<b>Retirement/Pension Benefits</b>		
<b>Social Security Cards &amp; Benefits*</b>		
<b>Stock Certificates/Bonds</b>		
<b>Wills/Trusts/Estate Plans</b>		
<b>Other:</b>		
<b>Other:</b>		
Safe Deposit Box Info <i>(if applicable)</i> – Physical Location: _____ Box Number: _____		
Location of keys: _____		
Name of Financial Institution: _____ Phone Number: _____		
Address: _____		
<small>*Note about Social Security Benefits. The SS phone number is 1-800-772-1213. To claim SS death benefits after the death of a spouse, go to your local Social Security office and bring with you your spouse's death certificate, social security card, birth certificate, marriage certificate/license, and the birth certificates for each child.</small>		