

SECURE YOUR DOCUMENTS

PERSONAL INFORMATION

- Full legal name
- Social Security number
- Legal residence
- Date & place of birth
- Names & addresses of spouse & children
- Location of birth & death certificates & certificates of marriage, divorce, citizenship, & adoption
- Employers & dates of employment
- Education & military records
- Names & phone numbers of religious contacts
- Memberships in groups & awards received
- Names & phone numbers of close friends, relatives, doctors, lawyers, & financial advisors

FINANCIAL INFORMATION

- Sources of income & assets (pension from your employer, IRAs, 401(k)s, interest, etc.)
- Social Security information
- Insurance information (life, long-term care, home, car) with policy numbers & agents' names & phone numbers
- Names of your banks & account numbers (checking, savings, credit union)
- Investment income (stocks, bonds, property) & stockbrokers' names & 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 & debts — how & when they are paid
- Location of original deed of trust for home
- Car title & registration
- Credit & debit card names & numbers
- Location of safe deposit box & key

HEALTH INFORMATION

- Current prescriptions (be sure to update this regularly)
- Living will
- Durable power of attorney for health care
- Copies of any medical orders or forms you have
- Health insurance information with policy & phone numbers

