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FAMILY DOCUMENTS CHECKLIST.....

This family documents checklist is a good starting point. Make any necessary additions and skip items that don't apply. You should make sure the items on the list are easy to find, ideally organized in a fireproof filing cabinet or home safe. Complete the checklist: 1. listing locations and comments for each item 2. and send copies to your Trustee, the executor of your estate, Agents under your Durable Power of Attorney, Medical Power of Attorney and to key family members.

° EMERGENCY PAPERS AND INFORMATION

- Organ donor/
anatomical gift statement _____
- Burial instructions, cemetery plot, deed, prepaid cremation
documents, preferences of funeral home, cremation or burial
donations _____
- Key adviser and contact
phone numbers, addresses _____
- Lawyer, stockbroker,
financial planner, etc. _____
- Last will and testament _____
- Living will/health care proxy _____
- Military discharge
papers and other records _____
- Powers of attorney/
Durable Powers of Attorney _____
- Electronic Passwords _____
- Safe and combination _____
- Safe deposit box and keys _____

° NONFINANCIAL PERSONAL PAPERS

- Adoption Papers _____
- Birth Certificate _____
- Citizenship or naturalization papers _____
- Divorce/separation papers _____
- Marriage certificate, prenuptial agreement _____
- Passport number and expiration date _____
- Social Security Card _____

° INVESTMENT DOCUMENTS

- Annuity statements and policy documents _____
- Bearer bonds, for which coupons
are clipped for redemption _____
- Brokerage account statements
(include all IRAs, 401k, etc.) _____
- Investment club agreement _____
- Retirement plan statements _____
- Stock certificates not held in account _____

° FINANCIAL PERSONAL PAPERS

- Appraisal or inventory of valuables _____
- Automobile titles _____
- Buy/sell or partnership agreements _____
- Employer deferred
compensation agreement documents _____
- Federal/state gift-tax returns _____
- Income-tax returns from prior years _____
- Lawsuit or legal-actions pending documents _____
- Loans outstanding or debts
owed to you (promissory notes) _____
- Mortgage documents _____
- Prescription plan card/records _____
- Property tax and school tax records _____
- Real estate deeds, other titles of ownership _____
- Rental or lease agreements _____
- Trust agreements _____

° BANK AND CREDIT ACCOUNTS

- Bank and credit union account statements and books, statements
for individual retirement accounts, 401k, etc. _____
- Checks from checking or money market accounts _____
- Credit cards, account statements _____
- U.S. Savings Bonds _____

° INSURANCE DOCUMENTS

- Group life and retirement
policies (booklets, certificates) _____
- Health and accident insurance
ID cards and claim records _____
- Life insurance policy documents _____
- Mortgage insurance policy _____
- Property and casualty policy
documents (homeowners, auto, boat, etc.) _____
- Travel insurance policies _____
- Veterans administration insurance papers _____