



GATHER THE INGREDIENTS

Your Documents

Organizer Bag: <https://amzn.to/3NGbqrR>

2" Binder: <https://amzn.to/3Nn2shJ>

8 Tab Binder w/ dividers w/ pockets: <https://amzn>

1. VITAL RECORDS

- Birth certificate (certified copy - one for each family member)
- Adoption papers (if relevant)
- Baptismal papers /religious certificates (if relevant)
- Naturalization certificate (certified copy)
- Marriage / divorce certificate / decree (certified copy)
- Death certificates (certified copy) (if relevant)
- Social security card
- Social security annual statement
- Medicare card
- Medicare statements

2. CASH & INVESTMENT ACCOUNTS

- Certificates of deposit (CD's) original certificate
- Investment agreement(s) (original)
- Recent savings / checking account statement

3. PROPERTY

- Rental or mortgage agreement(s) (original)
- Property insurance policy (homeowners, renters)
- Property deed (s)
- Inventory of home and office equipment & furnishings

4. VEHICLE: AUTO/MOTORCYCLE/RV/BOAT

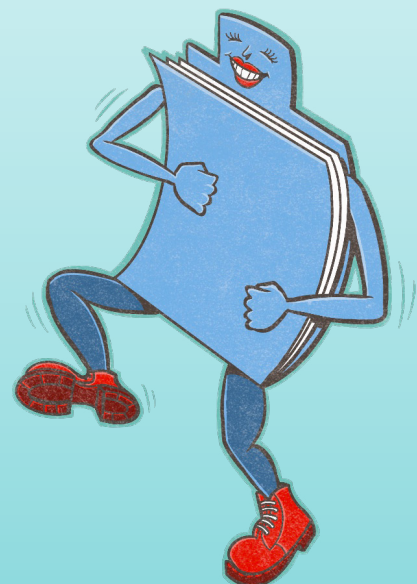
- Current vehicle insurance policy
- Official vehicle title
- Vehicle current registration
- Vehicle lease or sales documents
- Vehicle loan documents
- Vehicle up-to-date payment statements
- Vehicle lien release or loan payoff letter
- Vehicle warranty

5. RETIREMENT & CREDIT SAFETY

- Retirement investment agreement(s) (original)
- 401k and 403b agreement(s) (original)
- Veterans discharge certificate & claim number
- Copies of correspondence closing credit cards
- Up-to-date copy of your credit reports and fico score
- Identity theft protection agreement
- Vehicle warranty

6. ESTATE DOCUMENTS

- Durable Power of Attorney for health care – original & copy
- Durable Power of Attorney for property (finances) – original & copy
- Will – original & copy
- Pour over will – original & copy
- Living revocable trust – original & copy
- Advance directives
- Contracts for prepaid funeral expenses
- Cemetery arrangements



7. ACADEMIC RECORDS AND FINANCES

Diplomas, transcripts, portfolios, theses, dissertations
Student loan pay-off proof, master promissory note
529 annual statement
Coverdale annual statement
Copy of financial aid applications
Copy of up-to-date college loan documents
Scholarship application records
Default records
Deferment records
Forbearance records
Loan payoff letter



8. INSURANCE & BUSINESS-RELATED

Insurance policy, benefits statement/policy coverage and the latest statement:

Business agreements / contracts (original) – patents & copyrights

Original business formation & articles of incorporation

Health Insurance Policy(ies) (original) with benefit info

Life insurance policy(ies) (original) – with current beneficiary designations

Social Security Card/ State Disability Statement and ID card

Long-term care policy(ies) – with current beneficiary designations

Dental insurance policy

Dental savings plan

Cancer treatment policy

Homeowners insurance policy

Workers' compensation

Renters Insurance Policy or

Lease gap Insurance Policy

Travel Cancellation Insurance

Umbrella insurance policy

Medigap policy

Disability insurance policy

Medicare policy and id card

Accidental death Insurance Policy

Medicaid Policy and ID card

Business licenses, professional licenses, certifications

STORAGE POCKET CONTENTS

Five most cherished family photos – high quality copy

Id cards – passport, color copy drivers license

Cash – enough if you had to survive on cash for two weeks

Bank book/check book(s)

Credit cards – color photocopies of both sides

Medical folder that includes medical history, HIPAA authorization, vaccination records, insurance cards

Medications – prescriptions and 2-week supply

Keys for every home, vehicle, safe deposit box, fire box and storage unit (labeled)

External or jump drives with computer back-up info

