

MY IMPORTANT DOCUMENTS WORKSHEET

Description	Found & Filed	Details
Marriage Certificate		
Birth Certificate		
Last Will and Testament		
Living Trust		
Insurance Trust (ILIT)		
Charitable Trust		
Minor's Trust		
General Power of Attorney		
Medical Power of Attorney		
Medical Directive		
Custodial Account		
Donor Advised Fund		
Prenuptial Agreement		
Post-Nuptial Agreement		
Divorce Decree or Settlement		
Citizenship Papers		
Child Support Agreement		
Adoption Papers		
Organ Donation Form		
Burial or Pre-Need Agreement		
Certificate of Military Discharge (DD Form 214)		
Tax Returns (retain last 3 years)		
Deeds to Real Property		
Auto & Home Insurance Policies		

MY IMPORTANT DOCUMENTS WORKSHEET

Description	Found & Filed	Details
Vehicle Titles and Registrations		
Leased Vehicle Contract		
Other Titles (boat, motorcycle)		
Brokerage/Investment Statement(s) (CDs, IRA, Roth IRA)		
Annuity Contracts and Statement(s)		
HSA (Healthcare Savings Account) Statement(s)		
Medical Insurance Statement(s)		
Bank or Credit Union Statements (checking, savings, line of credit)		
Safe Deposit Box Inventory		
Home Safe Inventory		
Savings Bonds		
Stock Certificates		
Airline Frequent Flyer Statements		
List of Medications (taken regularly)		
Other		