

IMPORTANT DOCUMENTS ORGANIZER

Name	<input type="text"/>	Maiden name (if applicable)	<input type="text"/>
Date of birth	<input type="text"/>	Place of birth	<input type="text"/>
		Social Security Number	<input type="text"/>
Mother's full name	<input type="text"/>	Mother's maiden name	<input type="text"/>
Father's full name	<input type="text"/>		

Contacts

ATTORNEY

Name	<input type="text"/>						
Address	<input type="text"/>	City	<input type="text"/>	State	<input type="text"/>	ZIP	<input type="text"/>
Office phone	<input type="text"/>	Fax	<input type="text"/>	Email	<input type="text"/>		

EXECUTOR OF THE ESTATE

Name	<input type="text"/>						
Address	<input type="text"/>	City	<input type="text"/>	State	<input type="text"/>	ZIP	<input type="text"/>
Office phone	<input type="text"/>	Fax	<input type="text"/>	Email	<input type="text"/>		

FINANCIAL ADVISOR/STOCK BROKER

Name	<input type="text"/>						
Address	<input type="text"/>	City	<input type="text"/>	State	<input type="text"/>	ZIP	<input type="text"/>
Office phone	<input type="text"/>	Fax	<input type="text"/>	Email	<input type="text"/>		

INSURANCE REPRESENTATIVE

Name	<input type="text"/>						
Address	<input type="text"/>	City	<input type="text"/>	State	<input type="text"/>	ZIP	<input type="text"/>
Office phone	<input type="text"/>	Fax	<input type="text"/>	Email	<input type="text"/>		

ACCOUNTANT

Name	<input type="text"/>						
Address	<input type="text"/>	City	<input type="text"/>	State	<input type="text"/>	ZIP	<input type="text"/>
Office phone	<input type="text"/>	Fax	<input type="text"/>	Email	<input type="text"/>		

It's important that the following documents are organized and put it in a safe, secure location where family members can readily access. The following checklist has been compiled to help you and your family be prepared in the event you become ill or die.

IMPORTANT DOCUMENTS CHECKLIST

COMMENTS:

- Birth Certificate
- Financial Power of Attorney
- Medical Power of Attorney
- Living Will
- Insurance Policy/Records
- Cemetery Plot Papers/Records
- Last Will and Testament
- Marriage Certificate(s)
- Military Papers/Records
- Deed to Home
- Mortgage/Home Equity Loan Statements/Papers
- Bank Statements for Checking Account
- Bank Statements for Savings Account/Passbook
- Credit Card Statements
- Loan Papers/Records
- Records of Debts Owed to You
- Mutual Fund Records
- Bond Certificate/Records
- Stock Certificates/Records
- Post Office Box Key/Combination
- Previous Income Tax Returns/Records
- Safe Deposit Box Key
- Vehicle Registration/Title/Lease(s)