

Vital Papers and Other Important Information

1. WILL

- a) Location _____
- b) Location of copies _____
- c) Date of last update _____
- d) Prepared by _____
- e) Name and address of executor or executrix _____

- f) Guardian(s) of children _____

2. DURABLE POWER OF ATTORNEY

- a) Location _____
- b) Location of copies _____
- c) Date of last update _____
- d) Name and address of representative(s) _____

3. HEALTH CARE PROXY

- a) Location _____
- b) Location of copies _____
- c) Date of last update _____
- d) Name and address of representative(s) _____

All Things Considered

4. LIVING WILL

- a) Location_____
- b) Location of copies_____
- c) Names of those who have copies_____

5. LIFE INSURANCE

- a)

Company	Policy No.	Beneficiary	Type of Insurance
_____	_____	_____	_____
_____	_____	_____	_____
- b) Location of policies_____
- c) Name and address of agent(s)_____

6. HEALTH INSURANCE

- a)

Company	Policy No.	Who is Covered?	Type of Insurance
_____	_____	_____	_____
_____	_____	_____	_____
- b) Location of policies_____
- c) Name and address of agent(s)_____

7. LONG-TERM CARE INSURANCE

- a)

Company	Policy No.	Who is Covered?	Type of Insurance
_____	_____	_____	_____
- b) Location of policy_____
- c) Name and address of agent(s)_____

8. AUTOMOBILE INSURANCE

- a) Company Policy No. Type of Coverage

- b) Location of policies _____
- c) Name and address of agent(s) _____

9. LIABILITY AND PROPERTY INSURANCE

- a) Company Property Insured Policy No.

- b) Location of policies _____
- c) Name and address of agent(s) _____

10. BIRTH CERTIFICATE

- a) Location of originals _____
- b) Location of copies _____

11. MARRIAGE LICENSE/DIVORCE DOCUMENTS

- a) Location of originals _____
- b) Location of copies _____

12. MILITARY RECORDS

- a) Location of originals _____
- b) Location of copies _____

All Things Considered

13. TITLES AND DEEDS TO PROPERTY

- a) House:
1) Location _____
2) Location of copies _____
- b) Car:
1) Location _____
2) Location of copies _____
- c) Other property or real estate:
1) Location _____
2) Location of copies _____

14. BANK RECORDS

Name/Address of Bank	Acct. Type	Acct. No.	Location of Records

15. SAFE DEPOSIT BOX

Location	Box No.	Who has Access	Location of Keys

16 VALUABLES (jewelry, antiques, coins, furs, art works, etc.)

Description	Appraised Value	Serial No.	Location

17. INVESTMENTS (mutual funds, IRS, CD, checking accounts, TSA, savings accounts, bonds, etc.)

Type	ID/Acct. No.	Location of Papers	Agent or Broker
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

18. CREDIT CARDS AND CHARGE ACCOUNTS

Name of Card/Store	ID/Acct. No.	Who to Contact if Lost/Stolen
_____	_____	_____
_____	_____	_____
_____	_____	_____

19. DEBTS

Type	Owed to Whom	Payment Amount	Due Date
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

20. INCOME TAX INFORMATION

Tax Year	Refund/Payment	Prepared by
State _____	_____	_____
Federal _____	_____	_____
Location of Copies _____	_____	_____

21. RETIREMENT BENEFIT INFORMATION

Location of Statement	Beneficiary	Contact Number
a) TRS _____	_____	_____
b) Social Security _____	_____	_____
c) Other _____	_____	_____

All Things Considered

22. NAMES, ADDRESSES AND TELEPHONE NUMBERS OF PROFESSIONAL ADVISORS

23. NAMES, ADDRESSES AND TELEPHONE NUMBERS OF NEAREST RELATIVES

24. FUNERAL AND BURIAL ARRANGEMENTS

Contact/Funeral Director _____

Special Instructions _____
