

# Sabel & Oplinger, CPA, PC

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## Family Documents Checklist

This checklist should assist you in documenting your valuable papers. This document should be kept in a safe place. For each item, list the location, phone number, and any notes you wish to make. Copies of this document should be with the executor of your estate, key family members, and others who should be informed.

**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

### General Information

### Insurance Documents

- Attorney \_\_\_\_\_
- Accountant \_\_\_\_\_
- Insurance Agency \_\_\_\_\_
- Investment Advisor/Broker \_\_\_\_\_
- \_\_\_\_\_
- Executor \_\_\_\_\_
- Key Family Member \_\_\_\_\_
- Last Will and Testament \_\_\_\_\_
- Living Will/Health Proxy \_\_\_\_\_
- Powers of Attorney/Durable Powers of Attorney \_\_\_\_\_
- Family Trust – Trustee \_\_\_\_\_
- Safe Deposit Box, Keys and List of Inventory \_\_\_\_\_
- \_\_\_\_\_
- Birth Certificate \_\_\_\_\_
- Marriage Certificate \_\_\_\_\_
- Divorce/Separation Papers \_\_\_\_\_
- Prenuptial Agreement \_\_\_\_\_
- Social Security Card \_\_\_\_\_
- Passport \_\_\_\_\_
- Adoption Papers \_\_\_\_\_
- Naturalization Papers \_\_\_\_\_
- Jewelry, artwork, valuables \_\_\_\_\_
- Funeral Arrangements \_\_\_\_\_
- Other \_\_\_\_\_

- Life Insurance Policy \_\_\_\_\_
- Health Insurance Policy \_\_\_\_\_
- Accident Insurance Policy \_\_\_\_\_
- Mortgage Insurance Policy \_\_\_\_\_
- Veterans Administration Insurance Papers \_\_\_\_\_
- \_\_\_\_\_
- Auto Insurance Policy \_\_\_\_\_
- Long Term Care Policy \_\_\_\_\_

### Other

- Mortgage Documents \_\_\_\_\_
- Real Estate Deeds \_\_\_\_\_
- Auto Title/Lease \_\_\_\_\_
- Auto Loan \_\_\_\_\_
- Trust Agreements \_\_\_\_\_
- Bank Accounts and Numbers \_\_\_\_\_
- \_\_\_\_\_
- Credit Cards and Number \_\_\_\_\_
- \_\_\_\_\_
- U.S. Savings Bonds \_\_\_\_\_
- Tax Returns \_\_\_\_\_
- IRA Statements \_\_\_\_\_
- Investment Documents \_\_\_\_\_
- Stock Certificates \_\_\_\_\_
- Promissory Notes \_\_\_\_\_
- Other \_\_\_\_\_