

DOCUMENTS CHECKLIST

Gather these documents and place them in your Simply Ready Binder. Put personal documents behind the ID Kit (in a plastic sleeve) of the family member they apply to. Create a section for everything else and store it there.

PERSONAL DOCUMENTS:

- Birth Certificates
- Driver's License
- Military records
- Social Security Cards
- Passports
- Immunization Records
- Religious Certificates / Blessings
- Diplomas

TESTAMENTARY DOCUMENTS

- Will
- Trust and amendments
- Contact info for everyone named in will / trust
- Living Will
- Power of Attorney

PROPERTY:

- Deeds
- Titles
- Appraisals
- Home inventory list/picture CD

INSURANCE

- Policy summary pages
- ID Cards
- Vehicle registration cards

TAX AND INVESTMENT DOCUMENTS:

- 3 Years Income tax returns
- Property Tax Statements
- Investment plan summaries
- Stock Certificates
- Bonds
- Certificates of Deposit

LEGAL DOCUMENTS:

- Marriage certificates
- Divorce records
- Prenuptial / postnuptial
- Other contracts
- Child custody agreements
- Utility bill as proof of residency
- Adoption Papers

OTHER

- Recent and old family photos
- Cash
- Maps of area