
IMPORTANT
DOCUMENTS
BINDER

1 EDUCATION/EMPLOYMENT DOCUMENTS

Diplomas, Most Current Report Card for each school age child, Transcripts (copy), Business License, Employee Benefits Information, Employment Contract(s), Resume

2 FAMILY DOCUMENTS

Adoption Records, Birth Certificates, Church Certificates/Documents, Citizenship Documents, Concealed Carry Weapons Permit, Death Certificates, Disability Insurance Policy, Divorce & Child Custody Agreements, Drivers License, Health Insurance Policy, List of all Usernames & Passwords, Marriage Certificates, Military Identification & Military Record of Service, Passports & Copies, Recent family photo & photo of each family member individually, Social Security Cards & Copies

3 FINANCIAL DOCUMENTS

Business Cards from Accountant & Financial Planner, List of all Bank Accounts (include: bank account numbers, phone numbers, pictures of all cards front & back), Copies of Mutual Funds, Annuities, Bonds & Stock Certificates, Brokerage Account Yearly Statement, IRAs, Money Markets, Pension, 401(k), Safe Deposit Box #s (location & list of all contents), Student Loan Information, Tax Return (copy)

4 HOUSEHOLD DOCUMENTS

Appraisal, Deed, Firearm Serial List, Home Inventory List (include: appraisals, photos & videos), Land Survey, Lease Agreement, Mortgage Statement (copy), Property Taxes Bill (recent), Title Policy

5 LIFE PLANNING DOCUMENTS

Business Cards for Attorneys Regarding Advance Directives, Cemetery/Funeral Home Documents, Family Trust Documents, Final Directive, Power of Attorney for Health Care Authorization, Will Documents

6 MEDICAL DOCUMENTS

Business Cards for all Doctors, Dentists, & Specialists, Copies of Insurance Cards (Dental, Health, Prescription & Vision), Immunization Records, List Blood Types for each Family Member, List of Prescription Medication, Medical History for all Family Members, Medical Records, Test Results

7 PET DOCUMENTS

Immunization Records, License & Registration, Pedigree Papers, Recent Photo of Each Pet

8 VEHICLE DOCUMENTS

Auto Loan Documents/Warranties, Recreational Insurance Policies, Vehicle Documents/Boat Titles, Vehicle Registration & Insurance Cards (Copy), Title/Lease Agreements

1

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PETS DOCUMENTS

8

VEHICLE DOCUMENTS