



PEACE OF MIND Checklist

In an emergency there will be many unknowns. By compiling the information below into one location, and reviewing it often (at least quarterly) you can provide clarity and peace of mind to your friends and family. Be sure to capture documents and paperwork including as many details as possible: specific name, phone number, email, address, account #'s, amounts owed, etc.

YOUR FINANCIAL DOCUMENTS

- Bank Accounts + Statements
- Credit + Store Card Accounts + Statements (*highlight debt*)
- Mortgage or Lease Debt
- Equity Line of Credit/Release
- Car Loan Statement/s
- Student Loan Statement/s
- Personal Loan Document/s
 - Owe
 - Owed
- Judgement document/s
 - Owe
 - Owed
- Share Investments Statement/s
- Education Investment/s
- Property Investment/s + Cash
- Flow
- Pension + Retirement Statement
- Recent Tax Returns + Supporting Documents
- Safety Deposit Box Info, Key + Code
- Savings Bonds Info + Location
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YOUR LEGAL DOCUMENTS

- Will
- Living Will + Medical Directive
- Power of Attorney
- Trusts
- Property Settlements
 - Mortgage/s
 - Deed/s
- Birth Certificate
- Social Security Number
- Marriage Records
- Divorce Records
- Passports
- Auto, Boat, Other Vehicle Titles

YOUR HOME OWNER RECORDS

- Major Renovation Receipts
- Appraisals
- List or Video of Home Contents
- Subscriptions + Autopay
- Memberships to Cancel
- Home Warranties
- Storage Unit Information
- House Maintenance Contracts

YOUR RETIREMENT

- Business Closing + Transition
- Retirement Savings Plans
- Social Security Benefits
- Veteran Benefits
- Workers' Compensation
- Other Retirement Documents

YOUR LEGACY

- Personal Letter of Instruction
- Family History Documents
- Wishes for Family Members
- Possession Document + Allocations (Who Gets What)

YOUR ADDITIONAL BENEFITS

Employee benefits

- Life Insurance
- Pension
- Funeral Coverage
- Long Term Health Care
- Vacation + Sick Leave

Military benefits

- Discharge Papers
- Service Information
- Statement of Wishes for Military Funeral Service

YOUR INSURANCE POLICIES

- Auto/Boat
- Homeowners or Renters
- Life
- Umbrella
- Annuity
- Health Insurance
- Long-Term Care
- Other

YOUR KEY + EMERGENCY CONTACTS

- Executor of Will/Estate
- Attorney / Solicitor
- Accountant
- Clergy
- Doctor/s
- Insurance Agent
- Financial Advisor
- Veterinarian
- Location of Passwords

