

LIFE DOCUMENTS

Life documents are documents that contain important information about your life. Make sure to review and update your documents on a regular basis, and share copies with a trusted person in case something happens to you, and you are unable to access them yourself.

LEGAL IDENTIFICATION

- Social Security cards
- Birth certificates
- Adoption papers
- Marriage licenses or Divorce decree
- Passports
- Military ID
- Citizenship documents (green card & naturalization paperwork)

TAX & FINANCES

- Tax returns, W-2s & 1099 forms
- Any tax-related forms, receipts, & records
- Pay stubs & canceled checks
- Disability/unemployment records
- Retirement/pension plan records
- Investment statements

MEDICAL RECORDS

- Wills, powers of attorney, or living will
- Vaccination/immunization records
- Medical bills
- Burial instructions
- Health insurance policies

PROPERTY RECORDS

- Vehicle registration & titles
- Mortgage statements, deeds, & bills of sale
- Insurance policies (home, auto, personal property, etc.)
- Home Inventory
- *List of document storage locations