

## **IMPORTANT DOCUMENTS NOTEBOOK BINDER**

**\*KEEP ORIGINALS IN A PLACE OTHER THAN IN THE HOME LIKE A SAFE DEPOSIT BOX  
GIVE COPIES OF THESE DOCUMENTS TO A FAMILY MEMBER OR FRIEND FOR SAFEKEEPING**

**You will need 2-3” Binder, Plastic Sheet Protectors, Dividers for each category, Copies of documents**

### **ADDRESSES:**

ICE - In case of Emergency contacts  
Name, Address, Phone #, Emails of Family, Friends, Etc

### **AUTOMOBILE:**

Auto Policy, Insurance card on each car (copy)  
Auto Loan documents (copy)  
Copy of Title/or leases  
Recreational Vehicle/Boat Titles/loans  
Warranty, Record of Repairs

### **CHURCH:**

Membership Records printout (copy) – Get from ward clerk  
Important church certificates, ordinances, patriarchal blessings (copies)  
RS phone Lists, ward &/or stake Directory

### **EDUCATION:**

Diplomas (copy)  
Class Schedule (copy)  
Map of school  
School Calendar  
Transcripts (copies)

### **EMPLOYMENT**

Resume  
Job information

### **ESTATE PLANNING:**

Advanced Directive, Durable power of attorney for Health Care  
Financial Power of Attorney  
Revocable Living Trust  
Will  
Final Instructions  
Contracts of Funeral  
Documentation of Prepaid fees to cemetery/funeral home

### **FAMILY**

#### **Individual Family Member Information:**

Pictures of family members (current) (color copies)  
Child ID, DNA  
Adoption, Birth, Citizenship, Divorce, Marriage, Death Certificates (copies)  
Drivers License (Copies)  
Military Record of Service (copies)  
Passports (color copies)  
Social Security # cards & Annual Statements (copies)

## **FINANCIAL:**

Bank Name, Account # (deposit slips & business cards)  
Credit cards, credit card info. if lost phone #'s (color copies)  
Investments – Annuity contracts, Bonds, CD's, IRA'S, Stock certificates  
Mutual Funds, Money Markets  
Safe Deposit box #, location, list of contents  
Tax return (copies of last 3 yrs.)

## **GENEALOGY**

Backup/Gedcom – on CD, floppy or flash drive  
Printed copy

## **HOME:**

Food Storage Inventory  
Evacuation plan & escape routes  
Record of Home repairs, maintenance etc.

## **HOME OWNERSHIP**

Appraisal (copy)  
Mortgage statement (copy)  
Deeds (copy)  
Homeowners Insurance & coverage information (copy)  
Property taxes bill (recent)  
Land survey (copy)  
Title policy (copy)  
Home Inventory list, photos, video, & appraisals (copies)

## **INSURANCE**

Disability Insurance  
Life Insurance Policy  
Long Term Care Insurance  
Medicare/Medigap/Medicaid  
Travel Insurance

## **MEDICAL**

Business cards Dr. Hospitals, Ortho, Veterenarian, etc.  
Dental Records (copies x-rays)  
Health Insurance Cards  
Copy of Health Insurance Policy  
Immunizations for each family member  
Medical History, list of Medications taken  
Pet Records

## **PHOTOS**

CD, Memory Stick or Negatives of important pictures

## **RETIREMENT**

Pension plans  
Profit Sharing plan