

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