

Necessary Documents Checklist

Document	Have This	Location
Identification		
Birth Certificate		
Driver's License		
Passport		
Social Security card		
Social Security Information		
Childhood/Youth Records		
Immunizations		
School Transcripts		
Diplomas		
Legal Documents		
Adoption Certificates		
Airplane Title		
Boat Title		
Burial Plot Deeds/Information		
Car Title		
Divorce documents		
House/Land Deed		
Leases		
Marriage Certificate		
Mortgages		
Name Change		
Post-Nuptial Contracts		
Power of Attorney		
Pre-Nuptial Contracts		
RV Title		
Trailer Title		
Truck Title		
Trust Documents		
Will		
Financial Information		
401K Information		
403B Information		
Annuity Contracts		
Automatic Payment Info		
Bank Account Information		

Financial Information Continued

Beneficiaries List/Information		
Brokerage Accounts		
Credit card numbers/details		
Income Tax Records		
IRA Information		
Pension Information/Records		
Personal Prop. Inventory/Appraisals		
Property Tax Information		
Safe Deposit Box		
Savings Bonds & other Bonds		
Stock Certificates		
Insurance Information		
Airplane Insurance		
Boat Insurance		
Car Insurance		
Earthquake Insurance		
Excess Liability Insurance		
Flood Insurance		
Health Insurance		
Homeowner's Insurance		
Life Insurance		
Long Term Care Insurance		
Renter's Insurance		
RV Insurance		
Trailer Insurance		
Truck Insurance		
Medical Information		
Cremation Directive		
Do Not Resuscitate Order		
HIPAA		
Living Will (Adv. Directive)		
Medical Power of Attorney		
Organ Donation		
Other Documents		
Military Commission/Enlistment		
Military Discharge (DD-214)		
Military Records		