

## Document Checklist

| Document                               | Location |
|--|----------|
| <b>Personal:</b>                       |          |
| Birth Certificate                      |          |
| Marriage License                       |          |
| Pre- or Post-Nuptial Agreement         |          |
| Will                                   |          |
| Trust(s)                               |          |
| Living Will(s)/Power(s) of Attorney    |          |
| Mortgage Papers                        |          |
| Automobile Titles/Papers               |          |
| Income Tax Returns                     |          |
| Gift Tax Returns                       |          |
| Insurance Policies                     |          |
| Employee Benefit Documents             |          |
| Passport                               |          |
| Military Records                       |          |
| Medical Records                        |          |
| Citizenship Papers                     |          |
| Warranties                             |          |
| Current Bills                          |          |
| Funeral/Burial Documents               |          |
| Other: _____                           |          |
| <b>Business Ownership:</b>             |          |
| Partnership/Incorporation Documents    |          |
| Buy-Sell Agreement                     |          |
| Section 303 Stock Redemption Agreement |          |
| Business Valuation/Appraisal           |          |
| Business Tax Returns                   |          |
| Other: _____                           |          |

It is recommended that you keep the following documents in a **secure location in your home**:

- ◆ Copies of wills and trusts
- ◆ Copies of living wills and powers of attorney
- ◆ Income tax returns

These documents are best kept in a **bank safety deposit box**:

- ◆ Original wills, trusts and powers of attorney
- ◆ Marriage certificates, birth certificates, divorce decrees, death certificates
- ◆ Deeds and car titles
- ◆ Military discharge papers
- ◆ Any stock or bond certificates
- ◆ Citizenship papers
- ◆ Insurance policies

Consider giving these items to your **attorney, executor and/or spouse**:

- ◆ Living will/medical power of attorney (original should be given to the agent named in the document)
- ◆ Copies of wills, trust agreements, powers of attorney
- ◆ Inventory of insurance and investments
- ◆ List of professional advisors (attorney, accountant, insurance agent, etc.)
- ◆ Safety deposit box access information
- ◆ Funeral instructions

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