

Are Your Important Papers Easy to Find?

A little organization today can save your family time, confusion, and unnecessary stress later.

If someone you trust had to handle an emergency for you tomorrow, would that person know where to find the information that matters? You do not need an elaborate filing system. A simple, clearly labeled folder or binder can make a big difference.

Consider keeping these items together:

- ✓ **Personal records:** Birth certificate, marriage certificate, Social Security information, military records, and other key identification documents.
- ✓ **Insurance information:** Life, health, homeowners or renters, automobile, and other important policies, along with agent or company contact information.
- ✓ **Financial information:** A list of banks, investment or retirement accounts, recurring bills, and important account contacts. Avoid leaving passwords in an unsecured place.
- ✓ **Legal and planning documents:** Will, power of attorney, advance directive, funeral or burial instructions, and the name and contact information of your attorney, if applicable.
- ✓ **Property and household records:** Deed or lease information, vehicle titles, safe-deposit box information, and records for other important property.
- ✓ **People to contact:** A short list of family members, close friends, clergy, attorney, insurance agent, and others who should be contacted in an emergency.

One especially important step

Tell at least one trusted person where the folder is kept. The best-organized records will not help if no one knows where to look. Review the folder from time to time and replace outdated information.



Tucker's Tip: Keep original documents secure. For everyday reference, copies or a written summary may be enough. Store sensitive information where it is protected but still accessible to the person you trust.

A simple goal: Someone you trust should be able to find the essential information without having to search through drawers, boxes, old mail, or your phone.

This checklist is for general organizational purposes and is not legal or financial advice. For questions about wills, powers of attorney, taxes, or estate planning, consult an appropriate professional.