

Family Document Checklist

When a need arises, this checklist can help you access important documents. A copy should be readily available to your spouse, partner, or other loved ones. Store another copy in a safe place. You'll be able to quickly retrieve all documents if you list specific locations.

To our clients: We're happy to store a copy in our office files and may be able to assist your loved ones at a critical time. *Please be sure to include a note naming the individuals to whom we may release the checklist.* Otherwise, we may be prohibited by law from releasing any information.

Important Phone Numbers

<i>Professionals/Individual</i>	<i>Name</i>	<i>Telephone</i>
Accountant		
Attorney		
Financial Planner	Neal J. Solomon, CPF®, CLU, ChFC	518-725-6111
Insurance Agent		
Other:		

Family Documents

Indicate location:

Emergency Papers	<i>Office</i>	<i>Safe Deposit Box</i>	<i>Attorney</i>	<i>Home</i>	<i>Other:</i>
Power of Attorney					
Safe Deposit Box Key*					
Living Will					
Health Care Proxy					
Organ Donor Card					
Burial Instructions					
Cemetery Plot Deed					
Other:					

**If your safe deposit box is located in a bank, make note of the bank's name and location.*

Investment Documents	<i>Office</i>	<i>Safe Deposit Box</i>	<i>Attorney</i>	<i>Home</i>	<i>Other:</i>
Investment Statements					
Annuity Statements					
Annuity Policies					
Stock Certificates					
Other:					

Bank and Credit Accounts	<i>Office</i>	<i>Safe Deposit Box</i>	<i>Attorney</i>	<i>Home</i>	<i>Other:</i>
Bank Statements					
Credit Cards					
Checks					
Certificates of Deposit					
Savings Bond					
Other:					

Indicate location:

Non-Financial Papers	<i>Office</i>	<i>Safe Deposit Box</i>	<i>Attorney</i>	<i>Home</i>	<i>Other:</i>
Birth Certificate(s)					
Adoption Papers					
Citizenship Papers					
Military Discharge Papers					
Social Security Card(s)					
Marriage Certificate					
Medicaid/Medicare Info					
Prescription Plan Card					
Other:					

Financial Papers	<i>Office</i>	<i>Safe Deposit Box</i>	<i>Attorney</i>	<i>Home</i>	<i>Other:</i>
Real Estate Deed					
Mortgage Documents					
Income Tax Returns					
Automobile Titles					
Rental Agreements					
Lease Agreements					
Partnership Agreements					
Employer Comp Plans					
Promissory Notes					
Trust Documents					
Last Will & Testament					
Other:					

Insurance Policies	<i>Office</i>	<i>Safe Deposit Box</i>	<i>Attorney</i>	<i>Home</i>	<i>Other:</i>
Life Insurance					
Group Life					
Long-Term Care					
Disability					
Veterans Administration					
Travel Insurance					
Mortgage Insurance					
Automobile Insurance					
Home-Owners					
Other:					

Additional Notes:					