



SHAMROCK
Senior Health & Advocacy Ministries
A ministry of
Community of Christ

Denise Leichter, RN, Senior Health & Advocacy Minister
Southern California Mission Center
HOME: 818-996-4709 ☘ CELL: 310-403-9973
www.Seniors.CofChristLA.org ☘ DeniseLeichter@.CofChristLA.org

FAMILY DOCUMENTS CHECKLIST

The Family Documents Checklist is a good starting point to get your paperwork in order. You may want to add items to this list and skip items that don't apply to your situation. Ideally, these items should be easy to find, organized in a fireproof filing cabinet or home safe. We suggest that you complete this checklist, listing locations and comments for each item, and send copies to the executor of your estate and to key family members.

PRIVATE EMERGENCY PAPERS AND INFORMATION

- _____ Key advisor phone numbers, addresses such as your Attorney, Retirement Advisor, Accountant, Pastor. _____

- _____ Organ donor/anatomical gift statement
- _____ Living will/health care proxy
- _____ Burial instructions, cemetery plot deed, prepaid cremation documents, preferences of funeral home, cremation or burial, donations
- _____ Funeral, memorial service, life celebration plans
- _____ Powers of attorney/durable powers of attorney
- _____ Safe deposit box and keys
- _____ Safe and combination

INVESTMENT DOCUMENTS

- _____ Brokerage account statements (include IRAs, 403(b)s, KEOGHs, etc.)
- _____ Stock certificates not held in an account
- _____ Retirement plan statements
- _____ Annuity statements and policy documents
- _____ Bearer bonds, for which coupons are clipped for redemption
- _____ Investment club agreement

NON-FINANCIAL PERSONAL PAPERS

- _____ Birth certificates
- _____ Adoption papers
- _____ Marriage license
- _____ Divorce papers
- _____ Citizenship or naturalization papers
- _____ Military discharge papers and other records

BANK AND CREDIT ACCOUNTS

- Credit cards, account statements
- Bank and credit union account statements and books, statements for individual retirement accounts, KEOGHs, etc.
- Checks from checking or money market accounts
- U.S. savings bonds

FINANCIAL PERSONAL PAPERS

- Real estate deeds, other titles of ownership
- Mortgage documents
- Property tax and school tax records
- Appraisal or inventory of valuables
- Automobile titles
- Rental or lease agreements
- Buy/sell or partnership agreements
- Employer deferred compensation agreement documents
- Loans outstanding or debts owed to you (promissory notes)
- Lawsuit or legal actions pending documents
- Income tax returns from prior years
- Federal/state gift-tax returns
- Prescription plan card/records
- Trust documents
- Last will and testament

INSURANCE DOCUMENTS

- Health and accident insurance ID cards
- Life insurance policy documents
- Group life and retirement policies
- Veterans administration insurance papers
- Travel insurance policies
- Mortgage insurance policy
- Property and casualty policy documents (homeowners, auto, boat, etc.)

LOCATION OF FILES*

- Computer
- File Cabinet
- PDA
- Safe
- Safety Deposit Box

***NOTE:** In a separate document, give specific instructions (including passwords, pin numbers, etc.) on how this information might be accessed.