

THE MASTER CHECKLIST

OF DOCUMENTS/INFORMATION TO LOCATE AND ORGANIZE IN YOUR DOCSBAG



Inventory Records with a Briefcase check are stored in: _____

(i.e. DocsBag Extra Storage, Safe in Closet, Safe Deposit Box, etc.)

CASH ASSETS

- Bank Statements
- Investment Statements
- Mutual Fund Statements
- Stock Account Statements
- Savings Bonds
- Stock Certificates
- Cash
- Photocopies of Credit Cards
- Regular Payments to...
- Financial Advisor Contact Info
- _____
- _____
- _____

LEGAL RECORDS

- Birth/Death Certificates
- Prenuptial Agreement
- Divorce Judgment
- Buy/Sell Agreement
- Business Ownership Documents
- Military Documents
- Copies of ID's (passport, driver's license)
- Marriage Certificate
- _____
- _____
- _____

ESTATE PLAN

- Will
- Trust and Trust Amendments
- Power of Attorney
- Medical Power of Attorney
- Medical Directives
- Family Keepsakes
- Attorney Contact Info
- _____
- _____
- _____

TAX RETURNS

- State Returns
- Federal Returns
- CPA Contact Info
- _____
- _____
- _____

FUNERAL

- Prepaid Funeral
- Cemetery Lots
- _____
- _____
- _____

PETS

- Microchip Info
- Veterinary Info
- Medications
- _____
- _____
- _____

(MORE CATEGORIES ON BACK)



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STORE THIS MASTER CHECKLIST IN FRONT OF YOUR FOLDERS

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RETIREMENT

- IRA
- Roth IRA
- 401(k)
- Employer Provided
- Pension
- Social Security/Medicare
- _____
- _____
- _____

INSURANCE

- Life Insurance
- Annuities
- Disability
- Insurance Agent Contact Info
- Medical
- Long-Term Care
- _____
- _____
- _____

REAL ESTATE

- Deeds/Land Contract
- Leases
- Mortgage Documents
- Condominium Documents
- Closing Documents
- Homeowner's Insurance
- Storage Unit
- _____
- _____
- _____

VEHICLES

- Titles
- Insurance
- _____
- _____
- _____

PASSWORDS

- Password Manager
- Email Access
- Phone Access
- _____
- _____
- _____

FIREARMS

- Make, Model, Serial #s
- Sales Records
- _____
- _____
- _____



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