

# THE MEGA DOCUMENT LIST

## A COMPLETE LIST OF DOCUMENTS & INFO YOU MAY NEED FOR YOUR DOCSBAG

This is a complete list of common assets and documents that one may want for their DocsBag. Although it is meant to be as close to an exhaustive list as possible, **be sure to go over your particular situation with your elder planner and your family to ensure that nothing is missed.**

### 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
- CDs
- Treasury bills
- Money moving apps: Venmo, Paypal, Zelle
- Cryptocurrency
- Rental Income
- Online Investment Platforms i.e. Etrade
- College savings
- Options

### ESTATE PLAN

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

### FIREARMS

- Make, Model, Serial #s
- Sales Records

### FUNERAL

- Prepaid Funeral
- Cemetery Lots

### INSURANCE

- Life Insurance
- Annuities
- Disability
- Insurance Agent Contact Info
- Medical
- Long-Term Care
- Medicare Supplement
- Umbrella policy
- Appraisals

### 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
- Adoption records
- Bankruptcy
- Guardianship
- Immigration

### PASSWORDS

- Password Manager
- Email Access
- Phone Access
- Social Media Platform, Username
- Apple ID and password
- Google ID and password
- Phone # PIN
- Computer password
- 2nd email address and password

### PETS

- Microchip Info
- Veterinary Info
- Medications
- Pet Insurance

### REAL ESTATE

- Deeds/Land Contract
- Leases
- Mortgage Documents
- Condominium Documents
- Closing Documents
- Homeowner's Insurance
- Storage Unit
- Garage code
- Alarm/security system code
- Refi documents
- Documents that mortgage/land contract paid off
- Reverse mortgage
- HOA and what it includes
- HELOC
- Timeshare
- Foreign property

### RETIREMENT

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

### TAX RETURNS

- State Returns
- Federal Returns
- CPA Contact Info

### VEHICLES

- Titles
- Insurance
- VIN
- License plate #
- # of keys
- Location of keys
- Satellite radio
- Warranty and Maintenance plans
- Maintenance records
- Lease agreement

