

# Peace of Mind Kit

## Quick Reference Checklist

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Check the box next to each item you have and write down where your loved ones can find it. If you prefer to fill this out on your computer, scan the QR Code (See pg. 7). Update this Guide as necessary. If your *Peace of Mind Kit* is not current, it won't help your family when they need it.

### Estate Plan

Item	I Have This	Stored Where
Will	<input type="checkbox"/>	_____
Trust	<input type="checkbox"/>	_____
Power of Attorney (Financial)	<input type="checkbox"/>	_____
Power of Attorney (Health Care)	<input type="checkbox"/>	_____
Advance Health Care Directive / Living Will	<input type="checkbox"/>	_____
Funeral / Burial Instructions	<input type="checkbox"/>	_____
Attorney Contact Info	<input type="checkbox"/>	_____

### Legal Records

Item	I Have This	Stored Where
Birth Certificate	<input type="checkbox"/>	_____
Marriage / Divorce Records	<input type="checkbox"/>	_____
Military Records	<input type="checkbox"/>	_____
Citizenship / Immigration Documents	<input type="checkbox"/>	_____
Social Security Card	<input type="checkbox"/>	_____

Adoption Papers	<input type="checkbox"/>	_____
Name Change Documentation	<input type="checkbox"/>	_____
Passports	<input type="checkbox"/>	_____

## Cash Assets

Item	I Have This	Stored Where
Bank Accounts	<input type="checkbox"/>	_____
Certificates of Deposit	<input type="checkbox"/>	_____
Safe Deposit Box (and Key)	<input type="checkbox"/>	_____
Emergency Cash Location	<input type="checkbox"/>	_____

## Tax Returns

Item	I Have This	Stored Where
Last 3–7 Years of Federal & State Returns	<input type="checkbox"/>	_____
IRS Identity Protection PIN (if any)	<input type="checkbox"/>	_____
CPA Contact Info	<input type="checkbox"/>	_____

## Retirement

Item	I Have This	Stored Where
Pension Information	<input type="checkbox"/>	_____
401(k), 403(b), or Other Employer Plans	<input type="checkbox"/>	_____
IRA / Roth IRA Accounts	<input type="checkbox"/>	_____

Annuities	<input type="checkbox"/>	_____
Required Minimum Distributions (RMD) Info	<input type="checkbox"/>	_____

## Investments

Item	I Have This	Stored Where
Brokerage Accounts	<input type="checkbox"/>	_____
Mutual Funds	<input type="checkbox"/>	_____
Bonds / Treasury Securities	<input type="checkbox"/>	_____
Cryptocurrency Wallet Info	<input type="checkbox"/>	_____
Stock Certificates (if any)	<input type="checkbox"/>	_____
Financial Advisor Contact Info	<input type="checkbox"/>	_____

## Insurance

Item	I Have This	Stored Where
Life Insurance Policies	<input type="checkbox"/>	_____
Health Insurance Info / Cards	<input type="checkbox"/>	_____
Long-Term Care Insurance	<input type="checkbox"/>	_____
Disability Insurance	<input type="checkbox"/>	_____
Auto / Home / Umbrella Policies	<input type="checkbox"/>	_____
Insurance Agent Contact Info	<input type="checkbox"/>	_____

## Business

Item	I Have This	Stored Where
Business Ownership Records	<input type="checkbox"/>	_____
Partnership or Corporate Agreements	<input type="checkbox"/>	_____
Business Licenses	<input type="checkbox"/>	_____
Key Contacts or Employees	<input type="checkbox"/>	_____

## Real Estate

Item	I Have This	Stored Where
Deeds / Titles	<input type="checkbox"/>	_____
Mortgage Statements	<input type="checkbox"/>	_____
Property Tax Records	<input type="checkbox"/>	_____
Homeowners Association Info	<input type="checkbox"/>	_____
Leases	<input type="checkbox"/>	_____
Condominium Documents	<input type="checkbox"/>	_____
Storage Unit	<input type="checkbox"/>	_____

## Vehicles

Item	I Have This	Stored Where
Titles / Registrations	<input type="checkbox"/>	_____
Leases	<input type="checkbox"/>	_____
Insurance & Maintenance Records	<input type="checkbox"/>	_____

## Digital Life

Item	I Have This	Stored Where
Password List / Password Manager Info	<input type="checkbox"/>	<hr/>
Email Accounts	<input type="checkbox"/>	<hr/>
Cloud Storage Accounts	<input type="checkbox"/>	<hr/>
Social Media Accounts	<input type="checkbox"/>	<hr/>
Subscriptions / Streaming Services	<input type="checkbox"/>	<hr/>
Domain Names or Websites Owned	<input type="checkbox"/>	<hr/>

## Accounts Payable / Debts

Item	I Have This	Stored Where
Mortgage / Rent	<input type="checkbox"/>	<hr/>
Credit Cards	<input type="checkbox"/>	<hr/>
Utilities	<input type="checkbox"/>	<hr/>
Car Loans	<input type="checkbox"/>	<hr/>
Student Loans	<input type="checkbox"/>	<hr/>
Other Monthly Bills	<input type="checkbox"/>	<hr/>

## Medical

Item	I Have This	Stored Where
Health History / Diagnoses	<input type="checkbox"/>	<hr/>
List of Medications	<input type="checkbox"/>	<hr/>

Health Insurance Cards	<input type="checkbox"/>	_____
Medicare / Medicaid Info	<input type="checkbox"/>	_____
Physicians' Contact Info	<input type="checkbox"/>	_____

## Pets

Item	I Have This	Stored Where
Pet Records (Vet, Meds, Insurance)	<input type="checkbox"/>	_____
Pet Care Instructions	<input type="checkbox"/>	_____
Pet Sitter or Guardian	<input type="checkbox"/>	_____

## Firearms

Item	I Have This	Stored Where
Registration / Licenses	<input type="checkbox"/>	_____
Safe Storage Location	<input type="checkbox"/>	_____
Instructions for Transfer / Inheritance	<input type="checkbox"/>	_____

## Other

Item	I Have This	Stored Where
Valuable Personal Property (Jewelry, Art, etc.)	<input type="checkbox"/>	_____
Safe / Lock Combination	<input type="checkbox"/>	_____
Letters to Loved Ones	<input type="checkbox"/>	_____
Special Bequests	<input type="checkbox"/>	_____
Other Items to Mention	<input type="checkbox"/>	_____

Scan the QR Code or go to <https://docsbag.com/forms/>  
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