**Life’s Speed Bumps TO-DO List**

**Important Legal and Financial Documents**

Please review the following list of documents and verify whether or not you have each one that applies to you. Next, obtain the documents that you “need”. Thirdly, store these documents in an organized and secure area. It is suggested that you not use a Safe Deposit Box at a bank because it is more difficult and timely to access than a secure fire proof/waterproof safe in your home. You may want to make copies of some documents and give to the Executor of your Estate.

1. Birth Certificate/Adoption papers 1. Have need N/A
2. Marriage License 2. Have need N/A
3. Divorce Papers 3. Have need N/A
4. Social Security Card(s) 4. Have need N/A
5. Passport(s)/Green Card 5. Have need N/A
6. Naturalization Documents 6. Have need N/A
7. Will 7. Have need N/A
8. Power of Attorney (personal property) 8. Have need N/A
9. Vehicle Registration/Titles 9. Have need N/A
10. Driver’s License/ID 10. Have need N/A
11. Mortgage or Real Estate Deeds of Trust 11. Have need N/A

**Financial / Income**

1. Bank/Credit Union Statements 12. Have need N/A
2. Credit/Debit Card Statement 13. Have need N/A
3. Retirement Accounts (401k, IRA) 14. Have need N/A
4. Investment Accounts (Stocks, Bonds, Mutual Funds) 15. Have need N/A
5. Payable-On-Death (POD) (bank Accts etc.) 16. Have need N/A
6. Government Benefits (Social Security, Veterans etc.) 17. Have need N/A
7. Alimony/Child Support 18. Have need N/A
8. Appraisals of Personal Property 19. Have need N/A
9. Reward Accounts (Frequent Flyer/Hotel Rewards) 20. Have need N/A
10. Other 21. Have need N/A

**Tax Statements**

1. Income Tax Returns 22. Have need N/A
2. Property Tax Statement 23. Have need N/A
3. Personal Property Tax (i.e. Car tax) 24. Have need N/A

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**Financial Obligations**

1. Mortgage Statement 25. Have need N/A
2. Lease agreements 26. Have need N/A
3. Utility Bills (Electric, Water, Gas) 27. Have need N/A
4. Car/Boat Payment 28. Have need N/A
5. Alimony/Child Support 29. Have need N/A
6. Elder Care Facilities 30. Have need N/A
7. Loans (Student, Personal) 31. Have need N/A
8. Other 32. Have need N/A

**Medical**

1. Health Insurance ID 33. Have need N/A
2. Record of Immunizations/ Allergies 34. Have need N/A
3. List of Necessary Medications and dosages 35. Have need N/A
4. List of prior Surgeries and dates 36. Have need N/A
5. Living Will 37. Have need N/A
6. Dental Records /DNA swab 38. Have need N/A
7. Medical Directives 39. Have need N/A
8. Medical Power of Attorney (POA) 40. Have need N/A
9. Other 41. Have need N/A

**Military**

1. Military ID 42. Have need N/A
2. Military Discharge ( DD-214) 43. Have need N/A

**End Of Life Directives**

1. Burial/ Cremation Pre-Plan Directives 44. Have need N/A
2. Funeral prerogatives 45. Have need N/A

**Insurance Policies**

1. Property Insurance 46. Have need N/A
2. Vehicle/Boat Insurance 47. Have need N/A
3. Life Insurance 48. Have need N/A
4. Other 49. Have need N/A
5. Business Policies 50. Have need N/A
6. Other 51. Have need N/A
7. **Inform your EXECUTOR where all these documents are located**