List Of Documents To Store

After preparing a Will, Estate Plan, or any legal or other important document, you may ask, "Where should I store these critical documents?"

You should store all legal or other official documents in a safe, secure space. Since these documents are essential to both your daily life, and your loved ones' inheritance, it is important to establish both a secure space, and proper access privileges, to protect your most important documents and online assets.

Remember, both written and online documents, and digital assets – including content from computer email, social media accounts, and financial and business accounts, must be protected and stored securely.

Important legal documents you should store securely include:

- Will, including executor instructions
- Medical Power of Attorney
- Fiduciary Power of Attorney
- Advance Healthcare Directive (AHD)
- Health Care Proxy
- Directive to Physician
- Do Not Resuscitate (DNR), if applicable
- Donor Registry, if applicable
- Estate Plan
- Life Insurance
- Trust
- Cemetery Deed or Burial Plot Information
- Supplemental letter of instructions, if applicable

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Important financial documents you should store securely include:

- Bank accounts, including bank name, location and account numbers
- Retirement accounts, including name, address, and account numbers
- Insurance agent(s) contact names and numbers
- Benefit account information, including Long Term Care (LTC) documents
- Safe deposit box information, including box number, location and key location
- Vehicle information, including title and loan information
- Real estate documents, including property description, property deeds, and mortgage data
- Loans, including student, personal, and business
- Contracts, both business and personal
- List of other assets such as artwork, jewelry, silver, gold, etc.

Other important end-of-life life documents to store securely include:

- Birth Certificate
- Driver's License
- Social Security card
- Passport
- Military ID
- Marriage Certificate
- Divorce Papers
- Adoption Papers, if applicable
- Personal contact list of friends, family, or business associates
- Care instructions for pets, including feeding and veterinarian information
- Personal information, including journals or written documents

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