

Use the following checklist to organize important records and documents.

Record or Document	Location
Safety Deposit Box	Where is key? List of contents.
Wills	Safety deposit box; Lawyer's office.
Advanced Health Care Directive	Safety deposit box; With each physician; With each family member; In car or suitcase when traveling; Extra copy for hospital upon admission.
Durable Power of Attorney (health care)	Safety deposit box; Appointed power; Lawyer's office.
Durable Power of Attorney (finances)	Safety deposit box; Designated power; Lawyer's office.
Insurance Policies (life, property, etc.)	Home files with name, address, phone of agent.
Personal Documents (birth certificates, marriage licenses, Social Security, Military records, etc.)	Safety deposit box.
Bank Records	Home files.
Tax Records	Home files or labeled container in attic or garage (six years or more).
Bills and Receipts	Home files (current year); Past years with tax papers.
Debts	Names and addresses of all persons owed.
Contracts	Names and addresses of all parties involved.
Warranties	Home files.
Household Inventory	Safety deposit box.
Retirement Plan (list of beneficiaries)	Safety deposit box; Who should be contacted?
Investments (savings accounts, stocks, bonds, mutual funds, etc.)	Safety deposit box with names and addresses of investment institutions
Properties owned (list of real and person)	Safety deposit box.
List of Personal Possessions	Home files with name of designated person to receive.
Deeds, Titles, Surveys, Abstracts	Safety deposit box.
Leases (oil, property, etc.)	Safety deposit box.
Financial and Legal Advisors (bankers, accountants, brokers, etc.)	Home files (with names, addresses, phone numbers).
Letter of Last Instruction & Cemetery Records	Home files or family members.