



Estate Planning: Personal Records File

This Personal Records File will be helpful to your loved ones by gathering in one place, copies of important records and documents they will need. The items on the list can be kept in an envelope or other document holder and marked to show the contents and kept in a place known to your loved ones. Originals should be kept in a fireproof place, such as a safe deposit box, if appropriate.

1. Will, with name, address, and phone number of attorney.
2. Birth certificates for yourself, spouse, and children.
3. Marriage license and/or proof of divorce, if applicable.
4. Drivers' license and social security card.
5. Life, medical, dental, property, and auto insurance policies, with name, address, and phone number of insurance agent(s).
6. Proof of automobile ownership and registration, license plate number, and VIN number.
7. Real estate deed, title policies, mortgages, record of payments, tax receipts, receipts for improvements, etc.
8. Names of banks, savings, retirement and securities accounts, loans, and their account numbers.
9. Computer, voicemail, and internet user names and passwords for financial accounts, etc.
10. List of other assets and locations (including loans, deeds of trust and accounts receivable).
11. Safe-deposit box key, name and address of bank, and box number.
12. Name of credit card creditors and account numbers.
13. Veteran's discharge paper (DD-214).
14. Income tax returns for the last three years, and name and address of persons preparing the returns.
15. Name and address of broker or stock certificates and bonds you own (and purchase slips or other records of cost/date of purchase).
16. Receipts and appraisals for items of substantial value such as jewelry, furs, furniture, silver, art, etc.
17. Name, address, and telephone number of your employer and/or supervisor.
18. Documentation of retirement benefits, pension plan, and profit sharing.
19. Business records.
20. List of close relatives, addresses, and telephone numbers.
21. Funeral or memorial instructions.
22. General instructions to surviving spouse or children, including a list of advisers.
23. Any other information you would like to include.

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