

Getting Your Paperwork in Order

this list is brought to you by Jamie Novak

Your Name _____ Address _____

Phone number _____ Cell number _____

You may or may not have all these papers. This is a general list to help you gather your documents.

You may attach copies to this list. Keep originals in a safe place like a safety deposit box or a disaster proof box in your home.

Let someone you trust know where these documents are kept.

X	Document	Where is it kept?
	Birth Certificate	
	Marriage Certificate(s)	
	Death Certificate (for deceased spouse)	
	Divorce Decree	
	Military Records Branch of Service VA ID# Veterans Military Dates of Service	
	Driver's License/Organ Donor Card	
	Passport/Citizenship Paperwork	
	Will	
	Trusts	
	Power of Attorney	
	Living Will	
	Health care proxy	
	Life Insurance Policy(ies)	
	Disability Insurance (if any)	
	Long-Term Care Insurance (if any)	
	Safety Deposit Box(es) Location Number(s) Keys	

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Address Book Friends and colleagues	
Religious contacts	
List of houses of worship	
List of community memberships	
Cemetery Plots	
Funeral or Burial instructions	
Plan of care for pets	
Mortgage company and account information	
Utility Bills	
Homeowners Insurance	
Medicare Information	
Health Insurance	
Medications List and Pharmacy Information	
DNR Order and/or Advance Directive	
Automobiles Make/model/license plate	
Automobile Insurance company	
Bank(s)	
Financial planner	
Assets Annuities IRA	
Rental agreements	
Loans made to others	
Routine household bills	
Federal and state tax returns (last 3 years)	
Computer and social media Accounts User names Passwords	
Other Assets Jewelry Collectibles (coins, stamps, etc.)	

NOTE: This is a simple checklist intended for organization and not a replacement for any advice, legal, financial or otherwise.
Always be sure to check with a professional for actual advice.

More ideas at www.JamieNovak.com