

Permanent documents: Keep them in one place, a file or safe deposit box. Put copies on a flash drive or make copies of all and give to your lawyer and or contact person. Keep the file updated. You need to have access incase of fire, flood, earthquake and can't get to your home or bank or the internet.

Keep a master list of documents in the file

- PIN to cellular
- Driver's license
- Birth Certificate
- Health Insurance cards
- Social security cards
- Car insurance - carrier name & policy number, copy of page 1 of policy
- Home/renter's insurance policy – carrier and policy number, copy of page 1 of policy
- Will – the original.
- Emergency contacts
- Funeral instructions
- Durable financial - power-of-attorney
- Durable healthcare - power-of-attorney form
- Authorization to Release Protected Healthcare Information form
- Trust documents
- Proof of ownership of housing and land ownership, cemetery plots, vehicles, stock certificates and savings bonds; any partnership or corporate operating agreements; and a list of brokerage and escrow mortgage accounts.
- Loans you have made to others
- Three years of tax returns
- List of any debts you owe
- Marriage license or Domestic Partner Registration (RDP)
- Divorce judgment and decree or Dissolution (for RDP), if the case was settled , the stipulation agreement
- Most recent child-support payment order
- Life insurance policy to cover the child support
- "Qualified domestic-relations order," which can prove your spouse received a share of your retirement accounts.
- Retirement account plan documents: IRA, 401k, employee plans, self-employed plans
- List of all accounts and online log-in information for your family so they can notify the bank or social security of your death.
- Safe-deposit boxes - register your spouse, RDP or child's name with the bank and ask them to sign the registration document so they can have access without securing a court order.
- Life-insurance policies with the name of the carrier, the policy number and the agent associated with the policy. Both ones you purchase and employer provided.