

# The Gift of Answers® Workshop



## THE GIFT OF ANSWERS® CHECKLIST

### Personal Information

- Birth/Adoption Certificates
- Passports/Citizenship/Naturalization
- Death Certificates
- Divorce Decrees
- Durable Power of Attorney
- Healthcare Directives
- HIPAA Authorization
- Education Diplomas and Degrees
- Marriage Licenses
- Military Records (DD-214)
- Prenuptial / Postnuptial Agreements
- Social Security Cards and Numbers
- Digital Media - Websites, IDs and Passwords
- Copies of Wills & Trusts
- Funeral Instructions and Last Requests

Life & Disability Insurance Policies; (<http://www.mibsolutions.com/lost-life-insurance>)

### Automobile, Boat and Other Transportation Information

- Drivers License Numbers, Expiration Dates (photocopy)
- Insurance Policies for Above Items
- Titles to Autos, Boats and Motorcycles

### List of Credit Card and 800 Phone Numbers - Copies of Credit Cards

### Home

- Deed to Home and Other Properties
- Homeowners Insurance
- Lease and Rental Documents
- Pictures or Video of Home (inside and out)
- Product Warranties
- Receipts for Improvements and Appraisals

**Medical Information**

- Doctors, Dentists Contact Information
- Family Members Contact Information
- Health History for Each Family Member
- Healthcare Directives
- HIPAA Authorizations
- Long Term Care Policies
- Prescription Drug List by Family Member

**Tax Records**

- Federal, State and Local Tax Returns for the past three years

**Financial Information**

- Bank Account Numbers
- College Savings (529 Plans)
- Company Benefit Plans and Summary Plan Descriptions
- Financial Statements
- Investment Account Numbers
- Qualified Plans (IRA, 401(k), DEP, 403 (b), etc.)
- US Government Savings Bonds & Certificates
- Other Financial Information

**Computer Backup Files****Other Memorabilia (Pictures and Letters)****Advisor/Financial Institution Contact List**

- Accountant
- Attorney
- Bank/Banker
- Business Information/Human Resources Department – List of all Former Employers
- Financial Advisor
- Life, Disability and Health Insurance Agent
- Nearest Relatives – Emergency Contacts
- Personal Lines Insurance Agent
- Trust Officers and Trustees
- Other Contacts

**Location of Other Important Documents (Safety Deposit Box, etc.)****Ethical Wills & The Beneficiary Book****Other Information**