

THE FIREPROOF FILEBOX

Contents

Personal Information

- Birth/Adoption Certificates
- Citizenship/Naturalization Papers
- Education Diplomas and Degrees
- Marriage Licenses
- Social Security Cards and Numbers
- Passports
- Military Records
- Frequently Used Websites, IDs and Passwords
- Divorce Decrees
- Prenuptial / Postnuptial Agreements
- Death Certificates
- Copy of Wills & Trusts

Life & Disability Insurance Policies

Automobile, Boat and Other Transportation Information

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

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

Home

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

Medical Information

- Health History for Each Family Member
- Doctors Names and Contact Information
- Dentist Names and Contact Information
- Prescription Drug List by Family Member
- Healthcare Directives
 - Durable Power of Attorney for Healthcare
 - Living Will
- Long Term Care Policies

Tax Records

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

Financial Information

- Bank Account Numbers
- Investment Account Numbers
- College Savings (529 Plans)
- Copy of Company Benefit Plans and Summary Plan Descriptions
- Qualified Plans (IRA, 401(k), DEP, 403 (b), etc.)
- Other Financial Information and Accounts and Certificates

Computer Backup Files**Other Memorabilia such as Pictures and Letters****Advisor/Financial Institution Contact List**

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

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