

IMPORTANT DOCUMENTS CHECKLIST

BIRTH AND MARRIAGE INFORMATION

Birth Certificates <input type="checkbox"/>	Marriage License <input type="checkbox"/>	Divorce Decree(s) <input type="checkbox"/>
---	---	--

MILITARY AND SOCIAL SECURITY INFORMATION

Social Security Card <input type="checkbox"/>	Military Identification Card (Active Duty and Retirees) <input type="checkbox"/>	DD Form 214 or Other Military Separation Documents <input type="checkbox"/>
---	--	---

POLICIES

Life Insurance Policies to Include Servicemembers Group Life Insurance (SGLI) <input type="checkbox"/>	Burial Policy <input type="checkbox"/>
--	--

MEDICAL AND DEATH INFORMATION

Medical Preference Statement <input type="checkbox"/>	Durable Power of Attorney for Healthcare <input type="checkbox"/>	Contact Information <input type="checkbox"/>	
Burial Instructions <input type="checkbox"/>	Mortuary of Choice <input type="checkbox"/>	Memorial Service Instructions <input type="checkbox"/>	Death Notification List <input type="checkbox"/>

WILLS AND TRUSTS

Last Will and Testament <input type="checkbox"/>	Living Will <input type="checkbox"/>	Living Trust <input type="checkbox"/>
--	--------------------------------------	---------------------------------------

HOUSE INFORMATION

House Deed(s) <input type="checkbox"/>	Mortgage Contract(s) <input type="checkbox"/>
--	---

FINANCIAL ASSETS

Bank Accounts Information <input type="checkbox"/>	Retirement Accounts Information <input type="checkbox"/>
Retirement Annuity Information <input type="checkbox"/>	Investment Information <input type="checkbox"/>

DEBT INFORMATION

Loan Agreements <input type="checkbox"/>	Credit Card Accounts Information <input type="checkbox"/>
--	---

RECORDS

Disability Records, Veterans Administration <input type="checkbox"/>	Disability Records, Social Security <input type="checkbox"/>	
Disability Records, Other Sources <input type="checkbox"/>	Retirement Records <input type="checkbox"/>	Income Tax Records <input type="checkbox"/>

SPECIAL INSTRUCTIONS

Instructions for Filing For Social Security Benefits <input type="checkbox"/>	Instructions for Military Survivor Benefits Application through the Defense Finance & Accounting Office <input type="checkbox"/>
Instructions for Filing Veterans Administration Compensation Application (DIC) <input type="checkbox"/>	

NOTE: Some of these may not be applicable. Check only those that apply to you.

IMPORTANT DOCUMENT INVENTORY AND LOCATION FORM

DOCUMENT	LOCATION
Birth Certificate	
Marriage License	
Divorce Decree(s)	
Social Security Card	
Military ID Card (Active Duty and Retirees)	
DD Form 214 or Other Military Separation Documents	
Life Insurance Policies	
Burial Policy	
Medical Preference Statement	
Durable Power of Attorney for Healthcare	
Contact Information	
Burial Instructions	
Mortuary of Choice	
Memorial Service Instructions	
Death Notification List	
Last Will and Testament	
Living Will	
Living Trust	
House Deed(s)	
Mortgage Contract(s)	
Bank Accounts Information	
Investment Accounts Information	
Retirement Accounts Information	
Retirement Annuity Information	
Investment Information	
Loan Agreements	
Credit Card Accounts Information	
Disability Records, VA	
Disability Records, Social Security	
Disability Records From Other Sources	
Retirement Records	
Income Tax Files	
Instructions for Filing for Social Security	
Instructions for Filing for Military Survivor Benefits Application through DFAS	
Instructions for Filing for VA Compensation Application for Dependency and Indemnity Compensation (DIC)	

OTHER NOTES AND INFORMATION YOU WOULD LIKE YOUR EXECUTOR/TRUSTEE TO HAVE