

Important Documents Checklist

Use this checklist to help you gather, organize, and store your essential documents. You can check off each item as you go.

Personal Identification

- Birth Certificate
- Driver's License
- Passport

Medical Records

- Medical Aid Card
- List of Current Medications
- Doctor Contact Information
- Medical History and Vaccination Records

Legal Documents

- Last Will and Testament
- Power of Attorney
- Healthcare Directive / Living Will

Financial Documents

- Bank Account Information
- Pension/Retirement Account Info
- Investment Records
- Tax Returns (Past 5 Years)

Property & Insurance

- Home Ownership Documents (Deed/Mortgage)
- Vehicle Title/Registration
- Homeowners or Renters Insurance Policy
- Life Insurance Policy

End-of-Life Plans

- Funeral or Burial Instructions
- Obituary Draft or Notes
- Prepaid Funeral Plan (if applicable)