

**Personal**

- Copies of birth certificates for everyone in your household
- Copies of Social Security cards for everyone in your household
- A copy of your marriage license (hopefully, there is only one!)
- Copies of religious certificates (e.g., Baptism, Ketubah, etc.)
- Copies of adoption papers (if applicable)
- Copies of the drivers licenses for everyone in your household (color copies)
- Copies of passports for everyone in your household (color copies)

**Legal**

- Copies of Wills, Living Wills, Letters of Instruction, and Powers of Attorney
- Copies of Trust documents for entities for which you are a trustee, or in which you have a beneficial interest
- A list of contact information for all advisors, executors, trustees and guardians
- A complete list of assets and liabilities, with a footnote for each item (containing details of ownership and the contact information for all persons and entities relevant to the ongoing status of that asset or liability)
- Photographs of everyone in the household and all others for whom you are responsible

**Financial**

- Copies of Credit/Debit/ATM cards (color copies, both sides)
- Copies of Tax returns for a minimum of three years
- Copies of recent bank statements and brokerage statements (and the internet access ID and passwords for these accounts)
- Several blank checks from each checking account (not copies)
- Extra ID cards issued by your banks
- Documents that prove ownership of private placements and alternative investments
- Location of safe deposit boxes with the names of authorized signatories (and location of the keys)
- List of all User IDs and Passwords for access to all electronic based banking/financial information

**Ownership**

- A copy of the deed for your residence (and the municipality ID numbers for the location of the property)
- Copies of mortgage documents and other loan documents
- Copies of the title for cars owned by everyone in your household

**Insurance**

- Copies of life and property insurance policies and agent/agency contact information
- A complete inventory list of household items, and personal items at your office
- A photographic inventory of household and office items can be very helpful

**Health**

- Copies of health insurance documents, prescription and/or other benefit cards
- Photographs and copies of health records and licenses for household pets.
- The names and contact information for all personal physicians and caregivers
- Extra originals of health care proxies
- Healthcare proxies
- HIPPA release forms