

## **BE PREPARED: DOCUMENTS**

Remember—no matter how bullet-proof we feel, at some point, we are all going to die; perhaps already having become incapacitated.

In the event of your incapacitation or death, someone else will need access to sensitive and unique information. Having things in one place is handy, though not always ideal. So, where should you keep things, and what should you keep?

A home safe, lockable desk drawer or file cabinet, and/or safe deposit box provide secure options for important paperwork (and other items, such as valuable jewelry).

This list may help you get organized. Again, it's in no particular order, as they are all important. Some will be repeated from the other list.

- Social Security Card and number
- Marriage certificate
- Divorce decree
- Birth certificate
- Insurance policies, address, phone of agent/company
- Pension account numbers, address, and phone numbers
- Deeds and titles to property
- Auto titles
- Stock certificates
- Investment statements and name/number of advisor
- Trust arrangements
- Bank statements, location of branch
- Military discharge papers
- Loan information with contact numbers/ addresses
- Wills, Powers of attorney, Health care directives, living will