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A T T O R N E Y S A T L A W

REPRESENTING THE PACIFIC NORTHWEST SINCE 1953

25 Documents You Need To Keep In One Place

We may not like to think about it ... but how will your affairs be managed if you were suddenly involved in a severe accident which rendered you incapacitated? Certainly, this is why having Powers of Attorney in place for both financial and health care issues are so critical. But just as important is to ensure that the person(s) who has been granted this power knows where the most critical documents and information is kept. Of course, this may not be an issue if that person is a spouse --- but what if it is a child or family friend? For that reason, it is recommended that you keep the following documents in one location -- and that the person you have granted Power of Attorney to knows where the information is kept -- and how to access it, if necessary.

The Essentials

Power of Attorney – both Financial and Health Care

Will

Trust Documents

Health Care Directive (i.e., Living Will)

Tax Returns

Birth and Marriage Certificates

Health Insurance Policy Information

Passport

List of names, and contact information for: physicians, religious leaders, employer, children's school teachers/principal, veterinarian, relatives to be notified in emergencies, attorney, CPA

Proof of Ownership

Housing, Land and Cemetery Deeds, physical addresses

Escrow Mortgage Accounts

Loan Documents – Vehicles, Real Property, Student Loans

Vehicle Titles

Stock Certificates, Mutual Funds, Savings Bonds and Brokerage Accounts

Bank and Credit Union Accounts

Business or Partnership Contracts and Formation Documents

Life Insurance and Retirement

Life-Insurance Policies

Individual Retirement Accounts

401(k) Accounts

Pension Documents

Annuity Contracts

Bank Accounts/Social Media

List of Bank Accounts

Location of Safe Deposit Box and Personal Safe/combinations

List of Credit and Debit Cards

List of User Names and Passwords for all computer, email, social media, and internet accounts

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