

Bank Accounts:				
REMEMBER: ALWAYS BE CONSCIOUS OF POSSIBLE IDENTITY THEFT				
Bank Name	Address	Type	Account Number	Authorized to Sign or DPA*
Safe Deposit Boxes:				
Bank Name	Address	Owner	Box Number	Authorized to Sign or DPA*
Financial Documents:				
Documents	Where Kept?	Copies?	Contact Person	Authorized to Sign or DPA*
Current bills to be paid				
Checkbooks & bank statements				
Savings account passbooks				
Certificate of deposit records				
Employee benefit records				
Investment account records				
Retirement account records				
Stock & bond certificates				
Loan documents				
Leases & other contracts				
Cancelled checks				
Birth certificates, etc.				
Medical & dental records				
Current tax records				
Property deeds				
Past years' tax returns				
Inventory for safe deposit boxes				
PLEASE USE THE MASTER CONTROL INDEX NOTES PAGE TO EXPLAIN DETAILS				
Insurance Policies:				
Policy	Where Kept?	Owner	Contact Person	Beneficiary or DPA*
Medical or Medicare Cards				
Disability				
Life				
Long Term Care				
Homeowners & Liability				
Umbrella Liability				
Auto				
* Note: DPA means Durable Power of Attorney holder				

