



Vital Document Checklist

Compiling and securing important legal and financial documents should be one of your first tasks. Once assembled, consider scanning and sharing these files with a trusted friend or family member. Original paper copies should be kept secure and close at hand throughout your move.

Key documents may include:

- ☐ Legal Identification
- ☐ Birth/Death Certificates
- ☐ Marriage License
- ☐ Name Change Documentation
- ☐ Passports
- ☐ Driver's License

Estate Planning Documents

- ☐ Revocable Living Trust
- ☐ Advanced Medical Directives
- ☐ Last Will and Testament
- ☐ Financial Power of Attorney
- ☐ Do Not Resuscitate (DNR) Order

Insurance Policies and Beneficiary Designations

- ☐ Life Insurance
- ☐ Health Insurance
- ☐ Long Term Care Insurance
- ☐ Disability Insurance
- ☐ Property/Homeowner Insurance
- ☐ Vehicle Insurance
- ☐ Umbrella/Liability Insurance

Bank Statements

- ☐ Checking Accounts
- ☐ Brokerage Account
- ☐ Investment Statements (List and Location of Assets)
- ☐ Retirement Accounts (IRAs, 401(k)s, and Annuities)
- ☐ Escrow Accounts
- ☐ Personal Loans
- ☐ Leases
- ☐ Mortgages/Lines of Credit
- ☐ Credit Bureau Reports

Proof of Ownership Documents

- ☐ Deeds for any Real Estate
- ☐ Original Automobile and Boat Titles
- ☐ Stock and Bond Certificates
- ☐ Prenuptial/Postnuptial Agreements
- ☐ Assisted Living Lease or Contract
- ☐ Cemetery Deeds

Business Documents

- ☐ Corporate, LLC, or Partnership
- ☐ Documents Business Licenses
- ☐ Contracts
- ☐ Employment Agreements
- ☐ Business Licenses

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