



STEP 1: Decide where to store important documents.

What do you value in storage?

- Easy access (Safe deposit boxes can't be opened outside of bank hours)
- Security (Heavy safes are harder to steal than small lock boxes)
- Cost (How much can you afford to spend? Options range from twenty dollars to thousands)
- Fire protection (many basic safes guarantee fire protection up to 1550 degrees for 30 min.)
- Flood protection (Do you live in a flood-prone area?)

We will store our documents (where) _____

ACTION ITEM BUY A SAFE or set up a SAFE DEPOSIT BOX.

Location of safe _____ Location of key _____

STEP 2: Gather important documents you already have and put them in a safe place.

What documents do you have currently?

Document	Yes, I have this	Yes, and it's in a safe place
Passport		
Birth certificate		
Marriage Certificate		
Social security cards		
Insurance policies		
Car title		
House deed		
Wills, trusts, living will		
Tax records		
Cash for emergencies		
Other _____		

What do we still need to gather? _____

Action items	Who will do it?	Check when done

STEP 3: Get on the same page as your spouse.

Make sure you BOTH have access to all critical information:

- locations of important documents (see step #1)
- emergency contact information
- logins and passwords for online accounts (bank, utilities, etc.)

Use the following forms to record critical information, and then store in a secure location (like your safe).

Or, create a password protected document/spreadsheet on your computer. *Note: make sure the password for the document is one you can easily remember and that is *different* from the passwords *in* the document.

FAMILY CONTACTS		
NAME: _____	RELATIONSHIP: _____	PHONE: _____
NAME: _____	RELATIONSHIP: _____	PHONE: _____
NAME: _____	RELATIONSHIP: _____	PHONE: _____
NAME: _____	RELATIONSHIP: _____	PHONE: _____

PERSONAL CONTACTS			
	Name/Company	Phone Number/Email	Notes
Accountant			
Financial Planner			
Company HR			
Will Executor			
Physician			
Hospital			
Pharmacy			

ONLINE ACCOUNT INFORMATION

Account	Company	Username	Password	Notes
Monthly Bills				
Rent/mortgage				
Gas				
Electric				
Water/trash				
Internet				
TV/cable				
Insurance				
Home/renter				
Car				
Life				
Medical				
Dental				
Finances				
Bank accounts				
Loan				
Loan				
Credit card				
Credit card				
Credit card				
Investments				
401K/IRA				
Other				