Get It Together ✔
How to Organize Your Records and Important Information

The first step in getting your affairs in order is to gather up all your important personal, financial and legal information so you can arrange it in a format that will benefit you now, and your loved ones later. Then you’ll need to sit down and create various lists of important information and instructions of how you want certain things handled when you die or if you become incapacitated. Here’s a checklist of areas you need to focus on.

PERSONAL INFORMATION
- **Contacts**: Make a master list of names and phone numbers of close friends, family, clergy, doctors, and professional advisers such as your lawyer, accountant, broker and insurance agent.
- **Personal documents**: Include such items as your birth certificate, Social Security card, marriage license, military discharge papers, etc.
- **Secured places**: List all the places you keep under lock and key or protected by password, such as safe deposit boxes, safe combination, security alarms, etc.
- **Service providers**: Provide contact information of the companies or people who provide you regular services such as utility companies, lawn service, etc.
- **Pets**: If you have a pet, give instructions for the care of the animal.
- **End of life**: Indicate your wishes for organ, tissue or body donation including documentation (see donatelife.net), and write out your funeral instructions. If you’ve made pre-arrangements with a funeral home include a copy of agreement, their contact information and whether you’ve prepaid or not.

LEGAL DOCUMENTS
- **Will**: Include the original copy of your will and other estate planning documents you’ve made.
- **Power of attorney**: This names someone you trust to handle money matters if you’re incapacitated. If you don’t have a will or power of attorney, do-it-yourself resources like legalzoom.com and Nolo’s Quicken WillMaker (nolo.com) can help you create them for a few dollars.
- **Advance directives**: These documents – a living will and medical power of attorney – spell out your wishes regarding your end-of-life medical treatment when you can no longer make decisions for yourself. For free advanced directive forms visit caringinfo.org or call 800-658-8898.

FINANCIAL RECORDS
- **Income and debt**: Make a list of all income sources such as pensions, Social Security, IRAs, 401Ks, interest, investments, etc. And do the same for any debt you may have – mortgage, credit cards, medical bills, car payment.
- **Financial accounts**: List all bank and brokerage accounts (checking, savings, stocks, bonds, mutual funds, IRAs, etc.) and their contact information. And keep current statements from each institution in your files.
☐ **Company benefits:** List any retirement plans, pensions or benefits from your current or former employer including the contact information of the benefits administrator.

☐ **Insurance:** List the insurance policies you have (life, long-term care, home, auto, Medicare, Medigap, prescription drug, etc.) including the policy numbers, insurance agents and phone numbers.

☐ **Credit cards:** List all credit and charge cards, including the card numbers and contact information.

☐ **Property:** List real estate, vehicles and other properties you own, rent or lease and include documents such as deeds, titles, and loan or lease agreements.

☐ **Taxes:** Keep copies of tax returns for seven years and the contact information of your tax preparer.

Keep all your organized information and files together in one convenient location – ideally in a fireproof filing cabinet or safe in your home. Also be sure to review and update it every year, and don’t forget to tell your loved ones where they can find it.