

Keeping Records of Your Personal Information and Documents

This section provides a thorough guide to keeping track of personal information and important documents in one convenient location.

Certificates and legal documents

Legal papers that document your personal history may be needed to apply for benefits or to carry out legal instructions.

You should have at least two *certified* copies of your marriage license or any dissolution of marriage documents, as well as birth certificates for you, your spouse and each of your dependent children. Certified copies can usually be obtained from the county clerk, registrar or recorder of the county in which the event took place, or from the Office of Vital Records.

Keep the certified copies in a home safe or bank safe deposit box. Keep additional copies in a safe location away from home.

The importance of a will

A will can:

- ✓ Eliminate problems and misunderstandings during settlement
- ✓ Allow for the distribution of your property according to your wishes
- ✓ Let you nominate a guardian or guardians to raise your children

If you die without a will, state law will dictate who gets what property and when. Talk to your lawyer about preparing a will for both you and your spouse.

Consider advance directives

At some point, you may not have the mental or physical ability to express your wishes for your own healthcare. That is where advance directives can help. You can write advance directives using forms or software, or have a lawyer help you. Provide copies of these documents to your family and primary care physician.

Living will

A living will is a legal document that describes the kind of medical or life-support treatments you want if you are seriously or terminally ill.

Durable power of attorney for healthcare

A durable power of attorney gives another individual the right to make all critical healthcare decisions for you in case you are incapacitated or unable to make your own decisions.

Durable power of attorney for property

A durable power of attorney gives another individual the right to make all critical financial decisions for you in case you are incapacitated or unable to make your own decisions.

Do not resuscitate (DNR)

If a medical emergency occurs, this form alerts emergency personnel that you do not wish to receive cardiopulmonary resuscitation (CPR).

The Basics

DATE THIS RECORD WAS CREATED _____

DATE(S) REVISED _____

PHOTOCOPIES GIVEN TO _____

Personal Information

NAME	DATE OF BIRTH	SOCIAL SECURITY NUMBER
------	---------------	------------------------

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Notes

Important Contacts

LAWYER

Name	Work phone	Mobile or home phone	Company name and account number (if any)

GENERAL INSURANCE AGENT

Name	Work phone	Mobile or home phone	Company name and account number (if any)

EXECUTOR

Name	Work phone	Mobile or home phone	Company name and account number (if any)

LIFE INSURANCE AGENT

Name	Work phone	Mobile or home phone	Company name and account number (if any)

FINANCIAL ADVISOR

Name	Work phone	Mobile or home phone	Company name and account number (if any)

ACCOUNTANT/TAX PREPARER

Name	Work phone	Mobile or home phone	Company name and account number (if any)

TRUSTEE/OTHER

Name	Work phone	Mobile or home phone	Company name and account number (if any)

Legal Documents

BIRTH CERTIFICATES

Name	Date of birth	Place of birth	Certificate #	Location of certificate

ADOPTION PAPERS

Certificate for	Date of birth	Place of birth	Certificate #	Location of certificate

GUARDIANSHIP

Guardian for	Date of guardianship	Attorney	Named guardian	Location of records

Legal Documents

MARRIAGE CERTIFICATES

Certificate for	Date of marriage	Place of marriage	Location of certificate	Certificate number

DIVORCE/SEPARATION/ANNULMENT PAPERS

Divorce decree for	Date of divorce	Place of divorce	Location of certificate	Certificate number

DEATH CERTIFICATES

Certificate for	Date of death	Place of death	Location of certificate	Certificate number

MILITARY RECORDS

Record for (name)	Type of record	Location of document

Legal Documents

WILLS

Will for	Date of will	Attorney	Executor	Location of will

TRUSTS

For the benefit of	Date of trust	Attorney	Trustee	Location of trust

Notes

Legal Documents

LIVING WILLS

Living will for	Dated	Attorney	Who can make decisions for me	Location of living will

LIVING WILLS (Healthcare, property, etc.)

Power of Attorney (POA) for	Date of POA	Attorney	Person named POA	Location of living will

Loans and Liabilities

CREDIT CARD INFORMATION (Credit Card 1)

In whose name	Creditor	Creditor's phone number	Account number

CREDIT CARD INFORMATION (Credit Card 2)

In whose name	Creditor	Creditor's phone number	Account number

CREDIT CARD INFORMATION (Credit Card 3)

In whose name	Creditor	Creditor's phone number	Account number

CREDIT CARD INFORMATION (Credit Card 4)

In whose name	Creditor	Creditor's phone number	Account number

