



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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