

IMPORTANT PAPERS BOOK

**THIS BOOK MAY NOT MATCH-UP WITH YOUR NEEDS COMPLETELY.
(MOST LIKELY YOU WILL PROBABLY NEED A LARGER BINDER.)**

THIS IS BASICALLY JUST A GOOD OUTLINE TO START WITH.

**BEING IN A BINDER MAKES IT EASY TO ADD TO OR TAKE OUT
SECTIONS.**

**KEEPING EVERYTHING IN ONE SAFE PLACE MAKES EMERGENCIES
OR DISASTERS EASIER TO QUICKLY TAKE ACTION IF NEEDED.**

**IF THINGS ARE ALL SPREAD OUT IN MANY DIFFERENT PLACES OR IN
SAFETY DEPOSIT BOXES THAT YOU DON'T HAVE ACCESS TO ON
WEEKENDS OR HOLIDAYS, IT COULD SLOW DOWN SOME VERY
IMPORTANT PROCESSES.**

I THINK THE SECTIONS ARE PRETTY CLEAR.

**THE CREDIT CARD SECTION HAS A COPY OF FRONT AND BACK OF
EACH CREDIT CARD SO THEY CAN BE EASILY CANCELLED OR
REPLACED IF LOST.**

**I LIST ALL OF THE MONTHLY BILLS THAT NEED TO BE PAID SO
ANYONE NEEDING TO, CAN CONTINUE TO PAY THEM IF NECESSARY.
IT ALSO LETS OTHERS KNOW WHAT BILLS THEY SHOULD BE
EXPECTING IF I CANNOT TELL THEM.**

**I ALSO KEEP A RECORD OF PAYMENTS THAT NEED TO BE TAKEN
CARE OF AT DIFFERENT TIMES OF THE YEAR, SUCH AS INSURANCE
PAYMENTS, HOA FEES, PROPERTY TAXES AND THE LIKE.**

Important Papers Book

Legal

- *Power of Attorney
- *Will
- *Trusts
- *Advance Care Directive

Certificates

- *Birth Certificates and Marriage License
- *Patriarchal Blessings
- *Military Documents and Social Security Cards

Contracts

- *Vehicles, House (Titles, Contracts, Insurance, Etc.)

Planning

- *Funeral (Cemetery Plots, Headstone, Insurance Policies)
- *Death Certificates

Finances

- *Bank Accounts, Cd's, Safe Deposit Box, Credit Cards
- *Payments that need to be made (Monthly & Yearly)

Pass Codes

LET'S SEE HOW WE STAND AS A GROUP

1. Do you have a Power of Attorney and know where it is? 1 point _____
Does your spouse know where it is? 1 point _____
Does your executor know where it is? 1 point _____

2. Do you have a Will and know where it is? 1 point _____
Does your spouse know where it is? 1 point _____
Does your executor know where it is? 1 point _____

3. Do you have a Trust and know where it is? 1 point _____
Does your spouse know where it is? 1 point _____
Does your executor know where it is? 1 point _____

BET YOU THINK YOU'RE CATCHIN' ON BY NOW. YOU'RE LOSING POINTS IF YOU DON'T HAVE AN EXECUTOR!

4. Do you have an Advance Directive and know where it is? 1 point _____
Does your spouse know where it is? 1 point _____
Does your executor know where it is? 1 point _____
OH.....Here's your chance! Bonus points if you have turned it into the Dr. or Hospital. 3 pts _____

5. Do you know where your Birth and Marriage Certificates are? 2 points _____
Does your spouse know where they are? 2 points _____
Does your executor know where they are? 2 points _____

6. Do you know where your original Social Security Card is? 1 point _____ (Women most current)
Does your spouse know where it is? 1 point _____
Does your executor know where it is? 1 point _____

7. More bonus points if you could find your Passport on a moment's notice? 4 points _____
(Don't you just love bonus points?)

8. If you have Military Documents needed for a funeral do you know where they are? 1 point _____
Does your spouse know where they are? 1 point _____
Does your executor know where they are? 1 point _____ (Thanks for your service!)

9. Do you know where your vehicle and house titles, contracts, and insurance policies are? 3 pts _____
Does your spouse know where they are? 3 points _____
Does your executor know where they are? 3 points _____ (Hope they'll be safe in a fire!)

10. Are you and your spouse both equally involved and aware of all the financial matters and concerns of your family? 5 points _____

Would your spouse or executor (family) know where to find your finance papers, life insurance policies and funeral desires? There are not enough points to cover the stress they will feel in a time of grief if they have to search all over the house to find them.

Now add your points from questions 1-10 together. The winners are!