



Grab and Go Binder Document Checklist

First, you'll need:

- 1 1/2" 3-ring binder
- clear sheet protectors
- 11 tab dividers

Then...

Label the dividers—one for each category below. Use the checklist to gather your important papers. Insert documents in sheet protectors and organize behind the corresponding divider.

1. Emergency Plan

- completed Family Emergency Plan

2. Auto

- registration and insurance card (copy)
- loan documents
- title/or lease agreement
- recreational vehicle/boat titles or loan documents
- warranty info

3. Education

- diplomas
- most current report card for each school age child
- transcripts (copy) or homeschool records

4. Employment

- resume
- employment contract(s)
- business license
- employee benefits information

5. Family

- recent photo of each family member
- birth, marriage, and death certificates
- adoption records
- divorce & child custody agreements
- drivers license (copy)
- military identification (copy)
- social security card (copy)
- passport (copy)
- child ID kits
- church certificates
- military record of service
- voter registration card (copy)
- citizenship documents
- concealed carry weapons permit (copy)
- genealogy information
- list of all usernames and passwords

6. Financial

- business cards for accountant and financial planner
- list of all banks accounts, including bank account numbers and bank phone numbers
- copy of front and back of all credit and debit cards
- mutual funds, annuities, money markets, brokerage account yearly statement (copy)
- IRAs, pension, 401(k), profit sharing plan statement (copy)
- 529 plans and UGMA/UTMA statement (copy)
- stock certificates and bonds
- safe deposit box #, location and list of contents
- tax return (copy)
- student loan information
- credit report

7. Housing

- appraisal
- mortgage statement (copy)
- lease agreement
- deed
- property taxes bill (recent)
- land survey
- title policy
- home inventory list—include photos/video and appraisals
- firearm serial numbers list

8. Insurance

- auto/recreational vehicles insurance policy
- health insurance policy
- homeowners/renters insurance policy
- umbrella insurance policy
- disability insurance policy
- life insurance policy
- long term care insurance policy
- Medicare/Medi-gap/Medicaid
- travel insurance policy

9. Life Planning

- business cards for attorneys
- advanced directive, power of attorney for health care
- authorization to consent to health care for minor
- financial power of attorney
- revocable living trust, family trust documents
- will
- final instructions
- cemetery/funeral home prepaid fees documentation and contracts

10. Medical

- business cards for all doctors, dentists, specialists
- health, dental, vision, prescription insurance cards (copy)
- immunization records
- list of blood types for each family member
- medical history for each family member
- medical records, test results and list of prescription medication for any family member with a serious health issue

11. Pets

- pedigree papers
- license registration
- immunization records
- recent photo of each pet