

## Organizing Your Personal Safety Net Checklist



Think of being in an emergency or a situation where someone else needs to find some of your important papers or documents. Where would they turn? Having a list of **what** you have and **where** it's located helps your family & friends (those you desire in your personal safety net) to help keep your life stabilized and moving forward.

Not everyone has or needs each of the following papers/information. Feel free to cross out/eliminate those that do not pertain to you. If you have, need or use any of these papers, enter a check mark, and fill out the current "location" of each of these – you'll be helping yourself and those who want to help you. *Feel free to add others we've left off – and we'd appreciate it if you'd pass that info onto us.*

### Papers/Information

### Location

#### A: For Emergency Moments:

- Blood type(s)
- Have kids? - School names & contacts
- Health insurance documents/info
- Info on Who holds Power of Attorney
- Legal name(s)
- Medical Power of Attorney
- Personal Safety Net wallet card
- Prescription plan card/records
- Workplace information

#### B: Longer term needs or info:

- Adoption papers
- Appraisal or inventory of valuable items
- Attorney's information
- Bank statements
- Birth certificate
- Brokerage information
- Burial instructions
- Cemetery plot deed
- Charitable donation preferences
- Checking or money market statements
- College savings information (509 Plan)
- CPA/Accountant
- Credit card statements
- Credit union accounts statements

- Divorce/separation papers
- Driver's license - copy
- Financial Power of Attorney
- Funeral Home information
- Information for obituary
- Insurance Representative
- Last Will & Testament
- Letter of instruction to executor
- Life insurance documents
- Loans outstanding (money owed)
- Long-term care paperwork
- Marriage certificate
- Medical bills
- Military discharge papers
- Mortgage documents
- Mortgage insurance policy
- Motor vehicle title
- Passport/Naturalization papers
- Prenuptial agreement
- Prior years' tax returns
- Promissory notes (debts owed)
- Property & casualty policy documents
- Property and school tax records
- Safe & combination
- Safe deposit boxes & keys
- Social Security Card
- Travel insurance paperwork
- Veteran's administration paperwork

[www.Personalsafetynets.org](http://www.Personalsafetynets.org) or 206-659-0665

Please contact us with ideas for additions to this list, and before copying or amending for public use  
Adapted by Personal Safety Nets® 2013 from various sources (including New York Life LifeFolio).