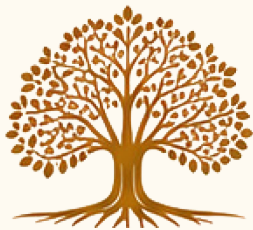


IMPORTANT DOCUMENTS

Important Documents

Know what you have, where it is, and who can access it.



“Preparation today gives your loved ones clarity tomorrow.”

LEGAL DOCUMENTS

Record the location of your important legal documents.

Document	Do You Have It?	Location (Safe, File, Attorney, etc.)	Last Updated	Notes
Will	☐ Yes ☐ No			
Trust (Revocable or Irrevocable)	☐ Yes ☐ No			
Durable Power of Attorney (Financial)	☐ Yes ☐ No			
Healthcare Power of Attorney	☐ Yes ☐ No			
Living Will / Advance Directive	☐ Yes ☐ No			
Guardianship Documents (If applicable)	☐ Yes ☐ No			
Other: _____	☐ Yes ☐ No			

FINANCIAL DOCUMENTS

Keep track of key financial records and where they are stored.

Document	Do You Have It?	Location (Safe, File, Institution, etc.)	Last Updated	Notes
Bank Account Information	☐ Yes ☐ No			
Investment Account Statements	☐ Yes ☐ No			
Retirement Account Information	☐ Yes ☐ No			
Life Insurance Policies	☐ Yes ☐ No			
Annuity Contracts	☐ Yes ☐ No			
Loan or Mortgage Documents	☐ Yes ☐ No			
Deed(s) / Property Records	☐ Yes ☐ No			
Business Ownership Documents	☐ Yes ☐ No			
Other: _____	☐ Yes ☐ No			

OTHER IMPORTANT RECORDS

Include any additional documents that may be important.

Document	Do You Have It?	Location (Safe, File, etc.)	Last Updated	Notes
Birth Certificate	☐ Yes ☐ No			
Social Security Card	☐ Yes ☐ No			
Marriage Certificate	☐ Yes ☐ No			
Divorce Decree (if applicable)	☐ Yes ☐ No			
Military Service Records	☐ Yes ☐ No			
Citizenship / Naturalization Papers	☐ Yes ☐ No			
Other: _____	☐ Yes ☐ No			



— — — — —
“A little organization today can make a difficult time much easier for the people you love.”



GAVREL FAMILY PLANNING KIT

**This worksheet is from the
Gavrel Family Planning Kit.**

Get the full kit free at

GavrelGuidance.com

Honor Your Past. Protect Your Present. Prepare Your Future.