



Key Bible Verse: By wisdom a house is built, and through understanding it is established; through knowledge its rooms are filled with rare and beautiful treasures. (Prov. 24:3-4)

Family Information

- Executive Summary (Family Vision Statement)
- Letters to the family
- Other: _____
- Other: _____

Personal/Estate Information

- Birth Certificates
- Social Security Cards
- Passports
- Marriage Certificates
- Auto Insurance
- Homeowner's/Renter's Ins.
- Health Insurance
- Long-Term Disability Ins.
- ID Theft Protection
- Life Insurance
- Umbrella Liability Ins.
- Estate Plan
- Power of Attorney
- Wills
- Beneficiary Information
- Funeral Instructions
- Other: _____
- Other: _____
- Other: _____

Financial Information

- Financial Account Log
- Safe Deposit Log
- Monthly Budget
- Tax Returns
- Money Market Statements
- Mutual Funds Statements
- College Funds
- Retirement Accounts
- Rental Property Summary
- Car Titles
- Home Ownership Records
- Passwords/Combinations
- Other: _____
- Other: _____
- Other: _____
- Other: _____



The checklist is designed to keep all your important documents together in one location incase an emergency happens. **We recommend the checklist gets updated once a year.** Also you may want to consider keeping an additional copy of this information in a Bank Safe Deposit.

"You cannot worship both God and Money." (Matt. 6:24 NLT)