



Grab-and-Go Document Checklist

* the ones people forget most

Every category, in the order I'd grab them. Tick what you already have in the box.

IDENTITY & VITAL RECORDS

- ☐ Birth certificate (one per person)
- ☐ Social Security card
- ☐ Passport or passport card
- ☐ Photocopy of your driver's license or state ID
- ☐ Printed list of emergency contacts *
- ☐ Copy of a recent utility bill (proof of address to replace lost IDs) *
- ☐ Marriage certificate
- ☐ Passports for every traveler
- ☐ Visa documents
- ☐ Photocopies of passports stored separately *

LEGAL & ESTATE

- ☐ Will or living will
- ☐ Financial power of attorney *
- ☐ Medical power of attorney or healthcare proxy *
- ☐ Advance healthcare directive *
- ☐ Letter of instruction (where everything is, what to do) *
- ☐ Prenup or postnup agreement, if you have one *
- ☐ Your parent's power of attorney (financial and medical) *
- ☐ Their advance directive or living will

FINANCIAL

- ☐ Last 2 to 3 years of tax returns
- ☐ Small amount of emergency cash *
- ☐ Brokerage and investment statements
- ☐ 401(k) and IRA account info
- ☐ Physical savings bonds or stock certificates *
- ☐ Safe deposit box key and location note *

INSURANCE

- ☐ Photocopy of your health insurance cards
- ☐ Life insurance policy and beneficiary list *
- ☐ Homeowners insurance policy
- ☐ Renters insurance policy
- ☐ Their Medicare and insurance cards
- ☐ Travel insurance policy *

HOME & PROPERTY

- ☐ Spare house and car keys *
- ☐ Home deed or title
- ☐ Mortgage documents
- ☐ Property tax records
- ☐ Home inventory list with photos (for insurance claims) *
- ☐ Receipts and warranties for big-ticket items *
- ☐ Lease or rental agreement
- ☐ Landlord or property manager contact info *

VEHICLES

- ☐ Vehicle title
- ☐ Vehicle registration
- ☐ Loan payoff or lien release *

MEDICAL & HEALTH

- ☐ Current medication list with dosages *
- ☐ Eyeglass or contact lens prescription *
- ☐ Immunization and vaccination records *
- ☐ Their medication list and doctors' contacts *
- ☐ International vaccination card *

KIDS & FAMILY

- ☐ Each child's birth certificate
- ☐ Kids' Social Security cards
- ☐ School records and transcripts *
- ☐ Custody or guardianship paperwork
- ☐ Adoption paperwork

PETS

- ☐ Pet rabies and vaccination records *
- ☐ Pet microchip numbers *
- ☐ Adoption or ownership papers
- ☐ Vet contact and pet medication list *

BUSINESS

- ☐ LLC or incorporation documents
- ☐ EIN confirmation letter
- ☐ Business licenses and permits
- ☐ Operating agreement
- ☐ Business insurance policy

MILITARY & VETERANS

- ☐ DD-214 discharge papers *
- ☐ VA benefits documentation
- ☐ Service medical records *

DIGITAL & PASSWORDS

- ☐ USB drive with scans of every document plus family photos *
- ☐ Password manager master password, sealed in an envelope *
- ☐ Two-factor (2FA) backup and recovery codes *
- ☐ A note of WHERE your accounts live (not the passwords) *
- ☐ Seed phrase or recovery words, sealed and hidden *
- ☐ Hardware wallet backup and PIN location note *