

Organizational Tool Kit

To get organized, place each of these documents into a file folder with this checklist. Place a check next to the item when you have added it to your tool kit. Then, be sure to store this organizational tool kit in an easily accessible, safe location, know to as few people as practical and secure.

My Vital Information

- ☐ Full Name _____
- ☐ Birth Date _____
- ☐ Place of Birth _____
- ☐ Spouse's Full Name _____
- ☐ Spouse's Birth Date _____
- ☐ Address _____

- ☐ Phone Number _____
- ☐ Mobile Phone _____
- ☐ Emergency Contact Person and Number _____

- ☐ Other _____

Other Personal Information

Family Members (Names, Contact Information)

- ☐ Spouse _____
- ☐ Child _____
- ☐ Child _____
- ☐ Child _____
- ☐ Child _____
- ☐ Child _____

Religious (Affiliation, Location and Contact)

- ☐ Other _____
- ☐ Other _____
- ☐ Other _____

My Identification Documents

- ☐ Certified Birth Certificate
- ☐ Copy of My Driver's License
- ☐ Passport
- ☐ Certified Marriage Certificate
- ☐ Certified Divorce Decree
- ☐ Certified Naturalization Document
- ☐ Other _____

My Federal Documents

- ☐ Social Security Card
- ☐ Certified DD214 or Certified Discharge
- ☐ Civil Service ID Card
- ☐ Military ID Card
- ☐ VA Benefits Decision Letter
- ☐ Other _____

My Income Sources

- ☐ Social Security
- ☐ Supplemental Security Income
- ☐ Veterans Benefit
- ☐ Military Retirement
- ☐ Federal Retirement
- ☐ State Retirement
- ☐ Private Pension
- ☐ Investment Income
- ☐ Other _____

My Financial Documents

Banking (list institutions & account numbers for each)

- ☐ Checking _____
- ☐ Savings _____
- ☐ Other _____
- ☐ Other _____
- ☐ Other _____
- ☐ Safe Deposit Key and Location
- ☐ Copy of Credit Cards (Front Only)
- ☐ Pension (list company and contact information)

Investment Accounts

(list institution and account numbers for each)

- ☐ Retirement (401k, 403B, 457)
- ☐ IRAS
- ☐ Money Market Account
- ☐ Other Investment Account

Loans (list institutions & account numbers for each)

- ☐ Home Mortgage _____
- ☐ Second Mortgage _____
- ☐ Automobile _____
- ☐ Second Automobile _____
- ☐ Student Loans _____
- ☐ Other Loans (including any as co-signer)

Insurance

(list institution & account numbers for each)

- ☐ Home _____
- ☐ Automobile _____
- ☐ Life _____
- ☐ Disability Insurance _____
- ☐ Other _____

My Property Documents

- ☐ Titles - Vehicles
- ☐ Deeds - Property
- ☐ Household Inventories (Lists/Photos - Household items, Antiques, Jewelry, Heirlooms, etc.)
- ☐ Burial Plot (Cemetery & plot number - Contract/Deed)
- ☐ Safety Deposit Box Inventory
- ☐ Other _____
- ☐ Other _____

Other Legal Documents

- ☐ Will, Including:
 - ☐ Name of Attorney & Law Firm/Contact Info

 - ☐ Name of Executor & Contact Info

- ☐ Codicil

- ☐ Living Will/Advanced Medical Directive
- ☐ Power of Attorney Documents
- ☐ Spouse's Death Certificate
- ☐ Other _____
- ☐ Other _____

Medical Information and Documents

- ☐ Primary Physician's Name and Contact Info

- ☐ Durable Power of Attorney for Health Purposes
- ☐ Primary Medical Insurance Card
- ☐ Secondary Medical Insurance Card
- ☐ Federal Employee Health Benefit Card
- ☐ Medicare Card
- ☐ Medicare Part D Card
- ☐ Tricare Card
- ☐ VA (Veterans Affairs) ID Card
- ☐ Prescription Drug Card
- ☐ Long-Term Care Insurance Policy
- ☐ Dental Insurance
- ☐ Vision Insurance
- ☐ Other _____

Organizational Tool Kit



This publication is intended to provide accurate & factual information on the issues covered. The firm, its employees, agents & staff make no representation, guarantee or warranty, express or implied, that this compilation is error-free or that the use of this directory will prevent differences of opinions or disputes, & assumes no liability whatsoever in connection with its use. The contents of this publication may be subject to change. Please call with any questions on how this information may impact your situation.



KHS & COMPANY
— CERTIFIED PUBLIC ACCOUNTANTS —

565-A Southlake Blvd, N. Chesterfield, VA 23236

804.334.0735 | 804.200.5575 (f)

info@KHSandCo.com | www.KHSandCo.com