



Documents: Important Documents and Belongings

In case of loss, you need to maintain a detailed inventory of your property's contents. This will prove the value of what you own, which could speed your claim processing. It will also provide documentation for tax deductions for your losses. A detailed inventory will help determine whether your house is insured for the correct amount. Copy important documents either by photo, scanning (.pdf file), or on paper

Personal Records

- Marriage certificate
- Birth certificate(s)
- Divorce decree
- Adoptions
- Death certificate(s)

Personal ID Documents

- Social Security card
- Driver's license
- Passport
- Military ID
- Green card

Estate Planning

- Wills
- Trusts
- Funeral arrangements
- Financial Powers of Attorney
- Medical Powers of Attorney
- Attorney names & phone #

Financial

- Investments
- Brokerage & retirement accounts
- Financial advisor contact info
- Bank account numbers & contacts
- Credit card numbers & contacts
- Credit Union info
- Debit card numbers

Tax Statements

- 1ST 2 pages of last year's federal & state tax returns
- Property tax
- Vehicle tax

Insurance Policies, Names & Phone Numbers

- Homeowners and/or Renters
- Earthquake
- Flood
- Auto
- Life
- Long-term care
- Health & disability
- Appraisals

Real Estate

- Mortgage 2-pg. Settlement Statement from Title Co
- Deeds of trust
- Lease or rental agreement
- Home Equity line of credit (HELOC)
- Architectural drawings

Health Insurance Cards / Information

- Dental
- Medicare & Supplemental
- Medicaid
- VA health benefits
- Disability benefits

Medical

- List of prescription meds/dosage
- List of OTC meds/dosage
- Immunizations
- Allergies
- Medical equipment (i.e., CPAP)
- Implemented devices, names/ids
- Pharmacy information

Pet Information

- Medical & Vaccination records
- Current photos
- ID chip numbers / name of chip co.
- Proof of ownership
- Vet contacts
- Insurance contacts / proof of insurance
- ID tags

Emergency Numbers

- Friends / family
- Employer/Supervisor
- Homeowners Association
- Social Service Providers
- Houses of worship
- Caregiver agency contact/service agreement

Inventory Home

- Photo or video each room, including garage
- Take inventory, include relevant info:
 - ⇒ type & price of each item (include receipts)
 - ⇒ date/year of purchase
 - ⇒ make, model & serial number of all appliances
 - ⇒ make, model & serial number of electronic equipment
 - ⇒ report the # of clothes items by type (e.g., tops)
- Make an annual home inventory for new purchases
- Store inventory in safe deposit box, cloud, or external drive

Miscellaneous

- Update personal address book
- Know where the key to the safe deposit box is
- List of passwords & usernames for online accounts
- Recent photos of household members
- Utilities account & contact info
- Keep vital records in a safe place
- Store hard copies in waterproof/fireproof box or safe deposit box
- Secure electronic copies w/strong passwords & save them on a thumb drive or external hard drive, in waterproof/fireproof box
- Give copies to trusted families/friends
- If you have to leave any animals behind, leave duplicate documentation about the animals for responders

