



Documents Every Household Should Keep in One Place

When something happens, the people helping you need quick access to key information. Keeping these documents together — and telling one trusted person where they are — prevents delays and stress.

Identity & Legal

- Birth certificates
- Social Security cards
- Marriage / divorce papers
- Military discharge (DD-214)
- Passports / citizenship docs
- Will & any trusts
- Power of Attorney
- Healthcare directives / Living Will

Insurance & Benefits

- Life insurance policies
- Health / Medicare cards
- Medigap or Advantage info
- Long-term care policies
- Auto & home insurance
- Annuity contracts
- Pension / retirement plan statements
- Social Security award letter

Financial

- Bank & investment statements
- Deed / mortgage papers
- Vehicle titles
- Tax returns (recent years)
- Loan documents
- Safe deposit box info & key
- List of accounts & passwords*
- Beneficiary designations

Personal & Contacts

- List of doctors & medications
- Emergency contacts
- Funeral / burial preferences
- Attorney & advisor contacts
- Employer / HR contacts
- Cemetery plot deeds
- Digital account inventory*
- Location of this binder itself

SECURITY NOTE

*Passwords and digital logins should be stored securely (password manager or sealed envelope), not in plain view. Tell one trusted person where the binder or digital folder is located — and keep a backup copy somewhere safe.

HOW HUGS CAN HELP

Organizing these documents is one of the most practical gifts you can give your family. We can help you review which insurance and beneficiary documents belong in the file so nothing important is missing. At HUGS we have no greater joy than to hear that our clients are walking with confidence.