FROM “IN CASE ANYTHING HAPPENS”

Important Documents Binder

Eight tabs, in the order someone else will need them — not the order you filed them.

THE EIGHT TABS, IN ORDER

- [ ] **1. Start Here** — who to call first, where the originals are, where the spare key is, the date you last checked
- [ ] **2. Medical** — insurance cards (front and back), health care proxy, medication list with doses, doctors, allergies
- [ ] **3. Identity** — copies of birth and marriage certificates, Social Security card, passports, driver’s licenses
- [ ] **4. Money** — every account: institution, last four digits, phone number. Not balances, not passwords
- [ ] **5. Bills and debts** — what auto-pays and from where, what’s paid by hand, mortgage, car loan, cards
- [ ] **6. Insurance** — life, home, auto, disability, long-term care: company, policy number, phone, beneficiary
- [ ] **7. Property** — copies of deeds, vehicle titles, the mortgage statement, leases
- [ ] **8. Legal** — copies of your will, any trust, financial power of attorney — and where each original is, and who drew it up

SEVEN LABELING RULES

- [ ] One cover sheet per tab saying what’s in it · date every page · mark each page COPY or ORIGINAL
- [ ] Write where each original lives, on the copy · a phone number beside every account
- [ ] No abbreviations only you understand · the first page tells them what to do first

KEEP OUT OF THE BINDER — WRITE WHERE THEY ARE INSTEAD

- [ ] Passwords written out in full · the original will · spare keys · cash
- [ ] Your Social Security card itself (a copy, or the last four) · anything you’d hate a houseguest to read

Organizer’s guide: how to assemble and label the binder so someone else can use it. Not legal or financial advice. Full explanations: incaseanythinghappens.com/blog/important-documents-binder

1 Start Here

Put this page in front of everything · if they read nothing else, they read this

WHO TO CALL FIRST

NAME	RELATIONSHIP	PHONE

Doctor

WHERE THE ORIGINALS ARE

Will

Deeds and titles

Passports

Birth and marriage certificates

Spare key

HOW TO GET INTO THINGS — WHERE, NOT THE PASSWORDS

Password manager / sealed envelope / Legacy Contact:

Who knows how:

Last checked

2 The ten-minute yearly check

Pick a date you'll remember · check six things · date the Start Here page

YEAR	BENEFICIARIES	EXPIRED IDS AND CARDS	NEW OR CLOSED ACCOUNTS	MEDICATION LIST	EMERGENCY CONTACTS	WHERE THE ORIGINALS ARE
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐