

Do You Know Where These Papers Are?



You'll be better prepared in an emergency if your important papers are organized.

Neal Stern, a Long Island-based CPA and member of the American Institute of CPAs National CPA Financial Literacy Commission, recommends keeping close track of the following documents:

Store in a safe deposit box or waterproof and fireproof safe:

- Birth and marriage certificates
- Passports
- Social security cards
- Car titles and registrations
- Property deeds and mortgage papers or lease documents

Store copies of these documents in a safe place outside your home (such as a close relative's home that isn't in the immediate vicinity):

- Driver's licenses
- Health insurance/Medicare cards
- Inventory of your possessions (photos are acceptable)
- Appraisals of valuables if available
- Insurance policies and contact information for claims processing
- Recent statements for banking, investment, and retirement accounts
- Documentation of home improvements

- Military records
- Will and trust documents/power of attorney
- Credit cards, loan records, utility receipts
- Safe deposit box information (location, number, key, inventory of contents)
- Tax returns for the previous 3 years
- Health care proxies
- Living wills
- Medical/prescription records
- Contact information for family members' doctors, dentists, lawyers, accountants, and insurance brokers



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