

# Grab and Go Binder Document Checklist

What you will need:

1 ½" 3 ring binder

Clear sheet protectors

11 tab dividers

1. **Emergency plan**
  - completed Family Emergency Plan
2. **Auto**
  - Registration and insurance card (copy)
  - Loan documents
  - Title/or lease agreement
  - Recreational vehicle/boat titles or loan documents
  - Warranty information
3. **Education**
  - Diplomas
  - Most current report card for each school age child
  - Transcripts (copy) or homeschool records
4. **Employment**
  - Resume
  - Employment contract(s)
  - Business License
  - Employee Benefits Information
5. **Family**
  - Recent photo of each family member
  - Birth, marriage, and death certificates
  - Adoption records
  - Divorce/child custody agreements
  - Drivers License (copy)
  - Military Identification (copy)
  - Social Security Card (copy)
  - Passport (copy)
  - Child ID Kits
  - Church Certificates
  - Military Record of Service
  - Voter Registration Card (copy)
  - Citizenship Documents
  - Concealed Carry Weapons Permit (copy)
  - Genealogy Information
  - List of all usernames and passwords
6. **Financial**
  - Business cards for accountant and financial planner
  - List of all bank accounts, including bank account numbers and bank home numbers
  - Copy of front and back of all credit and debit cards
  - Mutual funds, annuities, money markets, brokerage account yearly statement (copy)
  - IRAs, pension, 401(k), profit sharing plan statement (copy)
  - 529 plans and UGMA/UTMA statement (copy)
  - Stock certificates and bonds
  - Safe deposit box#, location and list of contents
  - Tax return (copy)
  - Student loan information
  - Credit Report
7. **Housing**
  - Appraisal
  - Mortgage Statement (copy)
  - Lease Agreement
  - Deed
  - Property Taxes Bill (recent)
  - Land Survey
  - Title Policy
  - Home Inventory List – Include photos/video and appraisals
  - Firearm serial numbers list
8. **Insurance**
  - Auto/recreational vehicles insurance policy
  - Health insurance policy
  - Homeowners/renters insurance policy
  - Umbrella insurance policy
  - Disability insurance policy
  - Life insurance policy
  - Long term care insurance policy
  - Medicare/Medi-gap/Medicaid
  - Travel insurance policy
9. **Life Planning**
  - Business Cards for Attorneys
  - Advanced directive, power of attorney for health care
  - Authorization to consent to health care for minors
  - Financial power of attorney
  - Revocable living trust, family trust documents
  - Will
  - Final instructions
  - Cemetery/funeral home prepaid fees documents and contracts
10. **Medical**
  - Business cards for all doctors, dentists, specialists
  - Health, dental, vision, prescription insurance cards (copy)
  - Immunization records
  - List of blood types for each family member
  - Medical history for each family member
  - Medical records, test results/list of prescriptions
11. **Pets**
  - Pedigree papers
  - License registration
  - Immunization records
  - Recent photo of each pet