

Where to Keep Financial and Legal Documents

TYPE OF STORAGE	DOCUMENT(S)	KEEP A COPY?	WHERE TO STORE DUPLICATE
Safe Deposit Box	Birth and death certificate; marriage license; adoption; citizenship; divorce papers	Yes	Home file
	Inventory and photos of household property	Yes	Home file
	Deeds, titles, bills of sale, car title, mortgage	Yes	Home file
	List of location of important papers	Yes	Home file, relative, friend or attorney's office
Home File	Tax returns; supporting documents for past 2 to 10 years	No	
	Passport	No	
	Bank Accounts	No	
	Copies of Credit Cards	No	
	Insurance policies	No	
	List of all assets, including brokerage and mutual fund accounts, stocks, bonds, bank accounts, real property, and employee benefit accounts	If possible	Friend or financial advisor
Attorney's Office	Will, durable power of attorney	Yes	Home file and executor or personal representative
	Funeral instructions	Yes	Friend, relative and home file
	Living will, health care power of attorney	Yes	Home file, physician, personal representative
	Location of safe deposit box	Yes	Joint owner, friend, relative and home file
Wallet	Driver's license or other photo ID	Yes	Home file
	Auto insurance card	Yes	In car
	Emergency contacts	Yes	Home file
	Blood type, list of allergies, medications	If possible	Home file

Martin J. Coursey is a registered representative of and offers securities, investment advisory, and financial planning services through MML Investors Services, LLC Member SIPC. (www.sipc.org)
 Supervisory Office: 76 Batterson Park Road, Farmington, CT 06032 (860) 674-1800. Coursey Financial Group is not a subsidiary or affiliate of MML Investors Services, LLC

