

RAMSEY LAW, PLLC

NECESSARY INFORMATION AND RECORDS CHECKLIST

General Checklist for All Family Members:

- Complete Ramsey Law Important Information Organizer
- Vital Records: birth certificate, death certificate, marriage certificate, citizenship records, divorce records, etc.
- Identification: driver's license/state ID, Social Security Card, Passport, Military ID, etc.
- Estate Planning Documents: Will/Trust, Powers of Attorney and other legal documents, burial plans, attorney contact information, etc.
- Asset Information: bank/investment accounts, CDs, retirement plans, insurance policies, crypto wallet information, vehicles, deeds, mineral leases, notes, judgments, financial advisor contact information, etc.
- Debt Information: credit cards, mortgages, car loans, other loans, lawsuit judgments, medical bills, bankruptcy records, attorney information, etc.
- Tax information: last three years of tax returns, W2s, 1099s, credit report
- Important Medical Information: doctor contact information, health insurance, disability/supplemental insurance, HR contact information, blood type, allergies, known medical issues, emergency contact info, etc.
- Online login information – password protect this and make sure that password is accessible to those who may need it
- Ongoing Payments and Payment Methods: subscriptions, auto-payments, ongoing contracts, etc.
- Business Information: formation documents, assumed name certificates, franchise tax reports, bylaws/governing documents of entity, annual meeting minutes, asset/bank information, debt information, licensing information, other documents filed on behalf of company, etc.
- Useful Contacts: contact information for financial advisor, CPA, attorneys
- Discuss Important Wishes with Family and Decision-Makers
 - Organ donation, life support, medical decisions
 - In-home/facility long term care (please note facilities are sometimes avoidable and no decisions should be made that would prevent someone from providing necessary care)
 - How you want your estate handled/distributed (this is NOT a substitute for proper estate planning documents that reflect your actual wishes)
 - Introduce your preferred decision-makers and beneficiaries to your professionals (CPA, attorney, financial advisor)
 - Where to find your important information and records