



Record	Safe Deposit Box	At Home in Safe	Temp	Perm
Family Records				
Baptismal and Confirmation records.....	X			X
Copyright and Patents.....	X			X
Insurance Policies (life, disability property and health).....	X			X
Passport: Copy of.....	X			X
Wills.....	X			X
Immunization records: Copy of.....	X			X
Education records and diploma.....		X		X
USCG and Merchant Mariner documents (copy).....		X		X
Medical history.....		X		X
Funeral plans documents.....		X		X
Record of important papers and contracts.....		X		X
Keys to Safe Deposit.....		X	X	
Property Records				
Burial Plot Deed.....	X			X
Deeds.....	X			X
Legal Records				
Birth Certificates, Citizenship and Naturalization papers.....	X			X
Marriage, divorce adoption records and death certificates..	X			X
Military Service Record and summary of benefits.....	X			X
Living Will.....	X			X
Wills and trusts (copies – unsigned for reference).....		X		X
Copy of Social Security Card.....		X		X
Durable Power of Attorney – Financial (designate timeframe).....		X	X	
Durable Power of Attorney – Health care (designate timeframe).....		X	X	
Personal Representative, guardian and conservator appointments.....		X	X	



SHIP OPERATIONS COOPERATIVE PROGRAM

Records Checklist

Record	Safe Deposit Box	At Home in Safe	Temp	Perm
Financial Records				
Contracts, notes and debts.....	X			X
Promissory notes, mortgages, liens installment contracts...	X			X
Investment certificates (stocks, bonds, mutual funds, CDs, real estate).....	X			X
Checking accounts.....		X	X	
Credit Cards.....		X	X	
Federal and State Income tax records.....		X		X