



Creating an Important Document Folder
A guide to organizing your vital information for your loved ones.

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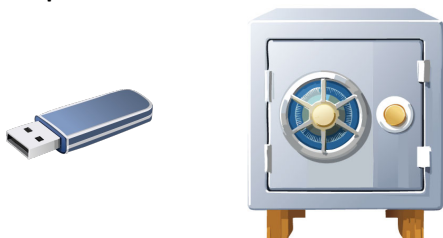
Why This Matters



- Ensures your loved ones can access everything they need.
- Reduces stress during difficult times.
- Prevents legal and financial complications.

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Step 1 – Choose a Safe Location



- Physical Folder – Binder or fireproof safe.
- Digital Backup – Cloud service or encrypted USB drive.

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Step 2 – Label and Organize



- Use labeled tabs or dividers.
- Separate into clear categories.

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Step 3 – Personal Identification



- DD 214 (veterans)
- Birth certificate, Social Security card, passport
- Marriage/divorce documents
- Child custody and court records
- Driver's license copy

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Step 3 – Instructions & Wishes



- Funeral plans
- Personal letters
- Digital accounts & passwords
- Photos for obituary or service

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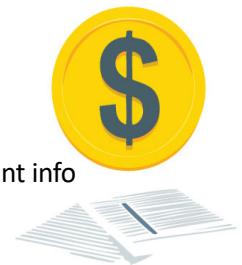
Step 3 – Legal Documents



- Will
- Living will / Advance Directive
- Power of Attorney (general & healthcare)
- Trust documents

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Step 3 – Financial Documents



- Bank and retirement account info
- Insurance policies
- Property deeds and titles
- Tax returns

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Step 3 – Health Documents



- Medical history
- Life-sustaining treatment preferences
- Organ donor instructions

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Step 4 – Ensure Legality



- Documents should be properly executed and witnessed.
- Consult legal and financial professionals to ensure validity.

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Step 5 – Inform Trusted People



- Let someone know where the folder is.
- Share keys or passwords if secured.

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Step 6 – Regular Updates

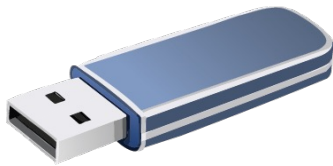


- Update as life changes: marriage, children, accounts, etc.
- Review at least once a year.

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Step 7 – Digital Backup

- Use encrypted cloud or USB storage.
- Ensure accessibility by a trusted person.



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Step 8 – Final Touches

- Type a summary document with locations.
- Include contact sheet: lawyer, advisor, family members.



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Closing Message

- Being prepared is a gift of peace and clarity for your family.
- Organize today, for tomorrow.



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