

**Instructions:**

- Provide information about your legal documents that apply to you for each category.
- Make copies of the original documents (including the front and back of cards) and **keep them separate from the originals.**

**Identification Documents** – List where these documents are located (if not with this kit).

Birth Certificate:

Driver's license:

Social Security card:

Marriage certificate:

Passport:

Military ID:

**Will** – List information that helps to locate these items and people.

Attorney

Name:

Phone:

Address:

My Executor

Name:

Phone:

General or Durable Power of Attorney Appointee

Name:

Phone:

*Medical Power of Attorney: See the Medical Advance Directives form  
( [www.csa.us/MedicalAdvanceDirectives](http://www.csa.us/MedicalAdvanceDirectives) )*

**Trusts** – List information related to any trusts that you have set up.

1. Name of Trust:

*Copy of this trust included with this kit.*

Location of original document:

Trustee of this trust:

Phone:

2. Name of Trust:

*Copy of this trust included with this kit.*

Location of original document:

Trustee of this trust:

Phone:

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**Contracts / agreements** – List where these documents are located (if not with this form).

**Divorce, annulment, pre- or post-nuptial agreements**

1. Document type:

Location:

2. Document type:

Location:

3. Document type:

Location:

**Child support, alimony, adoption papers**

1. Document type:

Location:

2. Document type:

Location:

**Rental lease, senior housing contract, home care agreements**

1. Document type:

Location:

2. Document type:

Location:

3. Document type:

Location:

**Other legal documents (e.g. cell phone contracts, automobile title, etc.)**

1. Document type:

Location:

2. Document type:

Location:

3. Document type:

Location:

*Business Assets: see the Business Assets Form at [www.csa.us/BusinessAssetsForm](http://www.csa.us/BusinessAssetsForm)*