

**ACCESS NOW ACTION CHECKLIST**

**ACCESS NOW To Do By Completed**

**Complete “Access Now”** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

**Make copies of original documents** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

**Store original documents in safe 24/7**

**accessible location** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

**Back up “Access Now” information**

**on a flash drive** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

**Keep in safe 24/7 accessible location**

stock certificates \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

securities and bonds \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

certificates of deposit \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

titles to property and vehicles \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

deeds \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

bills of sale—major purchases

and valuables \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

appraisals of property and valuables \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

retirement bank account records \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

company pension records \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

contracts and legal agreements \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

citizenship and immigration papers \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

**Duplicate and distribute copies of these documents to key family members and family attorney**

proof of insurance \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

letters of instruction \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

power of attorney for property \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

power of attorney for health care \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

living will \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

“Access Now” \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

**Keep in fireproof box at home**

birth certificates \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

death certificates \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

marriage licenses \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

divorce decrees \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

financial records \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

passports \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

insurance policies \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

wills \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

letters of instruction \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

power of attorney for property \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

power of attorney for health care \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

military discharge papers \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

income tax returns for past six years \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

property tax receipts \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏

warranties \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ ❏