

# BYTE RECOVER ENTERPRISES <sup>TM</sup>

## VITAL RECORDS CHECKLIST

*"Preserve Your Legacy.....Protect Your Records"*

TYPE OF DOCUMENT	LEGACY VITAL		DESCRIPTION/LINKS
FINANCIAL AND LEGAL DOCUMENTATION			
List Assets: Primary/Vacation Residences, Real Estate, Vehicles, Mortgages. Legacy Bills of Sale, Property Deeds, Jewelry and Safe Deposit Boxes	✓	✓	Proof of home ownership and/or records depicting ownership of items with demonstrable monetary value. Copies of mortgage deed or trusts are available through the lending institution. Vehicle title and/or registration is available from your local Department of Motor Vehicles.
Bank Accounts/Investment Records: Stocks, Bonds, Treasury Notes		✓	Documentation proving monetary investments in pursuit of financial profit or material benefit. Credit card numbers.
Insurance Policies		✓	The insurance policy is a contract (generally a standard form contract) between the insurer and the insured, known as the policyholder, which determines the claims which the insurer is legally required to pay. In exchange for an initial payment, known as the premium, the insurer promises to pay for loss caused by perils covered under the policy language.
Household Inventory		✓	A household inventory is an itemized list of your personal belongings. It provides a method of knowing exactly what personal property you own. An accurate household inventory is a necessity whether you are a homeowner or a renter.
Trusts and Wills	✓		A will is a legal document that specifies who will receive your property after your death. A trust holds the property transferred to it and can be given to a trusted loved one before your death. These documents can help reduce family conflicts, legal time, and financial costs during the stressful time of losing a loved one. Most financial planners can help you create a will or trust, or you can contact a local legal aid office for help. Remember to file living wills and advance directive with hospitals and primary care doctors.

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TYPE OF DOCUMENT HOUSEHOLD IDENTIFICATION	LEGACY VITAL		DESCRIPTION/LINKS
Family Birth Records	✓		Copies of birth, adoption, death, marriage, and divorce certificates are available from your state health or social services administration office. The Centers for Disease Control and Prevention (CDC) maintains a state-by-state contact list at <a href="https://www.cdc.gov/nchs/w2w/index.htm">https://www.cdc.gov/nchs/w2w/index.htm</a>
Medical information: Prescriptions with dosage. Documented HealthCare Proxy. Immunization and dental records		✓	Medicare card, Medicaid card, immunization records/allergies, disabilities documentation. Caregiver agency contract or service agreement. Copies of current prescriptions (including eye glasses). List suppliers of specialized in-home medical services and/or devices; visiting nurse agencies, hospital beds, wheelchairs, etc.
Child Identity Cards, Birth Certificates, Guardianship documentation	✓		Child ID Cards are intended to provide authorities with vital information about a child in the event of an emergency; I.E. separated at an airport or shopping center. A Child ID Card should include the name and photo of child, address, date of birth, hair and eye color, height and weight, any chronic illnesses or allergies, and parent/guardian contact information.
Legacy Family Photos	✓		Identify the photographs to be archived and arrange them by content headers; I.E. Names, location, year, or photo album title. The process of sorting through hundreds or possibly thousands of photographs can be a daunting and sometimes exhausting process. Undertaking this task with other family members can help to identify the content and also provide emotional support when heartfelt memories are revived.
Legacy Family Documents	✓		Examples include letters, manuscripts, personal journals.
Pet Information		✓	Ensure to keep a copy of your pet's ID tag numbers and microchip account information

### HOUSEHOLD CONTACTS

Contact/Address books (Updated)		✓	Names, addresses, telephone, email, social media contact information of immediate family and friends. Include family physicians and pharmacy contact information. Family attorneys, and pastoral counselors
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TYPE OF DOCUMENT GOVERNMENT ISSUED DOCUMENTS	LEGACY VITAL		DESCRIPTION/LINKS
Marriage Licenses, Divorce Decrees, Social Security Cards, Naturalization and Immigration Documents, Passports, Social Services		✓	Replacement Social Security Cards can be requested by calling Social Security Administration (SSA) office at (800) 772-1213. You can locate a nearby office through the web at <a href="https://secure.ssa.gov/">https://secure.ssa.gov/</a> . Information about applying for and renewing a passport is available at: <a href="https://travel.state.gov/">https://travel.state.gov/</a> . Information on U.S. Citizenship and Immigration Services is available at <a href="http://www.uscis.gov">www.uscis.gov</a> . Naturalization documents are the only acceptable proof of citizenship for individuals not born in the United States. Information regarding these documents can be reviewed at <a href="http://www.uscis.gov">www.uscis.gov</a> . Naturalization documents are the only acceptable proof of citizenship for individuals not born in the United States. Information regarding application, renewal, or replacement documents are available at <a href="http://www.uscis.gov/green-card">www.uscis.gov/green card</a> .
Internal Revenue Service (Tax Filings – 7yrs.)		✓	Financial experts recommend retaining tax returns records (personal and business) for seven years to comply with government audits or when applying for new lines of credit.
Military Records		✓	Veterans should archive their military discharge form DD 214. Copies are available by contacting the U.S. National Archives and Records Administration at (866) 272-6272 or, by accessing Veterans Records online at <a href="http://www.archives.gov/veterans">www.archives.gov/veterans</a> .