

## IMPORTANT DOCUMENT SCANNING CHECKLIST

In order to plan for your personal and business asset protection in case of hurricane, death, disability, or other unexpected circumstances, the following documents can be scanned as digital images (TIFF or PDF) onto CD, DVD, flash memory USB drive, portable/external hard drive, or other digital media to keep in a safe and secure place that is readily accessible:

<b>Estate Plan</b>	Wills, trusts, powers of attorney, designations of health care surrogate, declarations of preneed guardian, living wills
<b>Financial</b>	Check registers, deposit lists, balance sheets, profit and loss statements, monthly bills, recurring payments, Quicken and Microsoft Money printouts
<b>Investments</b>	Bank statements, broker statements, mutual fund statements, stock and bond certificates
<b>Insurance</b>	Homeowner, flood, auto, umbrella, life, health, dental, disability, professional liability
<b>Real Estate</b>	Deeds, closing statements, closing files, contracts, title insurance policies, surveys, appraisals, notes, mortgages, loan documents, home improvement records, photographs, videos
<b>Tangible Property</b>	Receipts, appraisals, photos, insurance and inventory of jewelry, art, furs, collections, contents of real estate, and other valuables
<b>Taxes</b>	Income tax returns, real estate taxes, homestead exemption, other taxes
<b>Vehicles</b>	Title certificates, tag registrations, window stickers, manuals, invoice and purchase documents, loan documents, photos, insurance
<b>Children</b>	Birth records, inoculation records, prescriptions, medical/dental records, fingerprints, report cards, evaluations, school records, test scores, awards, teacher notes, color photos, videos, audio recordings
<b>Consumer</b>	Warranties, manuals, sales receipts
<b>Debts</b>	Credit card statements, loan documents, loan statements
<b>Family History</b>	Birth certificates, marriage licenses, marriage certificates, property settlement agreements, dissolutions of marriage, prenuptial agreements, postnuptial agreements, death certificates, probate records, family trees, family records, family photos
<b>Medical &amp; Dental</b>	Medicine prescriptions, eyeglass and contacts prescriptions, inoculation records, explanations of benefits, medical histories, medical and dental care providers, insurance
<b>Pets</b>	Pedigrees, birth records, medical records, license tags, inoculation records, photos
<b>Photos &amp; Videos</b>	Family, friends, vacations, home, property, vehicles, insurance inventory, color, black & white

<b>Personal</b>	Address books, fingerprints, correspondence, club memberships, gym memberships, military service, diplomas, transcripts, certificates, awards, news clippings, memorabilia, keepsakes, family recipes
<b>Wallet/Purse</b>	Driver licenses, credit cards, debit cards, ID cards, checks, membership cards, addresses, medical insurance, auto insurance, traveler checks, AAA, voter ID, passport
<b>Business</b>	Corporate minute books, check registers, deposit lists, balance sheets, profit and loss statements, monthly bills, recurring payments, financial records, property records, employee records, substantive business information records, computer software lists, pension and profit sharing plan records