

# **RD SMITH LAW**

**Roger D. Smith, Attorney**

## **SECURE VALUABLES**

### **MAKE CHECK-OFF LIST AND COPY FOR FRIEND**

You never know when disaster or a theft may happen. Finding secure spots for your valuables can give you peace of mind. AARP suggests where to keep which items.

#### **IN A SAFE-DEPOSIT BOX**

- Birth certificates
- Certificates of deposit.
- Citizenship and naturalization papers.
- Copy of financial notebook
- Death certificates.
- Education degrees.
- IRA papers.
- Legal agreements
- Marriage/ divorce documents.
- Military discharge papers.
- Property bills of sale.
- Property deeds.
- Personal property appraisals.
- Personal property inventory and pictures.
- Stock and bond certificates.
- Vehicle titles.

#### **IN A FIREPROOF BOX AT HOME**

- Financial power of attorney.
- Insurance policies.
- Living will.
- Medical power of attorney.
- Property-tax receipts.
- Trust documents.
- Product warranties.
- Wills.

**COPIES WITH YOUR ATTORNEY, RELATIVE, FRIEND OR AGENT.**

- Burial instructions
- Financial plan.
- Financial power of attorney.
- Medical power of attorney.
- Living will.
- Trust Documents
- Wills.