

Miscellaneous Documents

This section is the catch-all for important documents that don't fit neatly into other categories.

Safe deposit box details. Personal safe access. Adoption records. Naturalization certificates. Military service records. Educational certificates. Professional licenses.

These documents might not be legally essential, but they could be important for proving identity, claiming benefits, or understanding your personal history.

Your executor needs to know what documents exist and where to find them.

WHY THIS MATTERS

Some of these documents unlock benefits. Military service records might qualify your family for veterans' benefits. Professional licenses might include death benefits. Safe deposit boxes might contain valuable items or important papers.

If your executor doesn't know these exist, your family could miss out on benefits or lose track of important personal history.

Let's document what you have.

Your Miscellaneous Documents

The records that don't fit anywhere else, but ones your family will be glad you noted down.

SAFE DEPOSIT BOX

Some boxes can't be accessed straight away after death. The bank may ask for probate or other paperwork first, so it's worth checking your bank's policy now.

BANK NAME

BRANCH LOCATION

BOX NUMBER

WHERE IS THE KEY

WHO ELSE HAS ACCESS

WHAT'S IN THE BOX

MILITARY SERVICE RECORDS

Service may qualify family for VA benefits. VA: 1-800-827-1000.

BRANCH

SERVICE NUMBER

YEARS OF SERVICE

RANK

SERVICE RECORDS LOCATION

MEDALS / HONORS

Your Miscellaneous Documents (cont.)

PROFESSIONAL LICENSE 1

TYPE	ISSUING BODY
LICENSE NUMBER	EXPIRY DATE
CERTIFICATE LOCATION	DEATH BENEFITS ATTACHED?

PROFESSIONAL LICENSE 2

TYPE	ISSUING BODY
LICENSE NUMBER	EXPIRY DATE
CERTIFICATE LOCATION	DEATH BENEFITS ATTACHED?

EDUCATIONAL CERTIFICATES

QUALIFICATION 1	INSTITUTION
YEAR COMPLETED	CERTIFICATE LOCATION

Your Miscellaneous Documents (cont.)

QUALIFICATION 2

INSTITUTION

YEAR COMPLETED

CERTIFICATE LOCATION

CITIZENSHIP & NATURALIZATION

AMERICAN CITIZENSHIP CERTIFICATE (LOCATION)

DATE GRANTED

COUNTRY OF ORIGIN

IMMIGRATION PAPERS (LOCATION)

OTHER CITIZENSHIP CERTIFICATE (LOCATION)

ADOPTION RECORDS

Adoption records can be sensitive. Note who should have access.

ADOPTION ORDER (LOCATION)

ORIGINAL BIRTH CERTIFICATE (LOCATION)

WHO MAY ACCESS THESE

OTHER RECORDS

HEALTH RECORDS (LOCATION)

AWARD / HONOR 1 (ORG, YEAR, LOCATION)

Your Miscellaneous Documents (cont.)

AWARD / HONOR 2 (ORG, YEAR, LOCATION)

VEHICLE REGISTRATION PAPERS (WHERE)

OTHER INSURANCE POLICY (TYPE / INSURER / LOCATION)

NOTES: ANYTHING ELSE ABOUT MISCELLANEOUS DOCUMENTS