

## Red File

We recommend that every client create a file of important documents and that they share the location of the folder with their emergency contact.

We recommend including the following:

- Copy of SS Card,
- Location of Safe Deposit Key(s)
- Copy of Drivers License, Passport, insurance cards (health, home, auto), life insurance policy(s),
- Birth certificate, marriage (or divorce) certification,
- COVID-19 vaccinations, general vaccinations
- Notation of where car title and mortgage papers are located
- List of: banks, lawyers, doctors, insurance agents, veterans benefits, pre-paid or pre-planned funeral contact