

## Disability Rights Legal Center

# CLRC

## Cancer Legal Resource Center

The CLRC is a joint program of the Disability Rights Legal Center & Loyola Law School Los Angeles

**National Office:**  
800 S. Figueroa Street, Suite 1102 ♦ Los Angeles, CA 90017

**Midwest Regional Office:**  
c/o McDermott Will & Emery LLP  
227 West Monroe Street, 44th Floor ♦ Chicago, IL 60606

866.THE.CLRC (866.248.2572) ♦ TDD: 213.736.8310

Fax: 213.736.1428 ♦ [CLRC@LLS.edu](mailto:CLRC@LLS.edu)  
[www.CancerLegalResourceCenter.org](http://www.CancerLegalResourceCenter.org)

## Personal Record File

This Personal Record File will be helpful to your loved ones by gathering in one place, copies of important records and documents they will need. The items on the list can be kept in an envelope or other document holder and marked to show the contents and kept in a place known to your loved ones. Originals should be kept in a fireproof place, such as a safe deposit box, if appropriate.

1. Will, with name, address, and phone number of attorney.
2. Birth certificates for yourself, spouse, and children.
3. Marriage license and/or proof of divorce, if applicable.
4. Drivers' license and social security card.
5. Life, medical, dental, property, and auto insurance policies, with name, address, and phone number of insurance agent(s).
6. Proof of automobile ownership and registration, license plate number, and VIN number.
7. Real estate deed, title policies, mortgages, record of payments, tax receipts, receipts for improvements, etc.
8. Names of banks, savings, retirement and securities accounts, loans, and their account numbers.
9. Computer, voicemail, and internet user names and passwords for financial accounts, etc.
10. List of other assets and locations (including loans, deeds of trust and accounts receivable).
11. Safe-deposit box key, name and address of bank, and box number.
12. Name of credit card creditors and account numbers.
13. Veteran's discharge paper (DD-214).
14. Income tax returns for the last three years, and name and address of persons preparing the returns.
15. Name and address of broker or stock certificates and bonds you own (and purchase slips or other records of cost/date of purchase).
16. Receipts and appraisals for items of substantial value such as jewelry, furs, furniture, silver, art, etc.
17. Name, address, and telephone number of your employer and/or supervisor.
18. Documentation of retirement benefits, pension plan, and profit sharing.
19. Business records.
20. List of close relatives, addresses, and telephone numbers.
21. Funeral or memorial instructions.
22. General instructions to surviving spouse or children, including a list of advisers.
23. Any other information you would like to include.

**DISCLAIMER:** This publication is designed to provide general information on the topics presented. It is provided with the understanding that the author is not engaged in rendering any legal or professional services by its publication or distribution. Although these materials were reviewed by a professional, they should not be used as a substitute for professional services. The CLRC has no relationship or affiliation with the referral agencies, organizations or attorneys to whom we refer individuals. Resources and referrals are provided solely for information and convenience. Therefore, the CLRC disclaims any and all liability for any action taken by any entity appearing on the CLRC's resource and referral lists.