



Creating a Red File

A “red file” is a group of copied documents that can be sealed in an envelope and mailed to someone you trust in case of a disaster. It should include:

- Birth, death and marriage certificates
- Adoption papers
- Identification, including driver’s license and passport
- Recent bank and brokerage statements
- House deeds
- Mortgage and home equity notes
- Car title, lease or loan information
- Insurance policies and agent contact numbers
- Credit and debit cards, both front and back
- A household inventory
- Tax returns for the past three years
- The location of wills, trusts, and power of attorney
- Names and contact numbers for executors, trustees and guardians
- A list of your financial advisers and their contact information
- A list of user IDs and passwords for online financial accounts.