

5 TIPS FOR SAFEGUARDING YOUR INSURANCE DOCUMENTS

Keeping insurance paperwork organized is essential for easy access and reference when needed. Here are the top five suggestions for where to store your insurance documents:

1

Physical File Folder

Maintain a dedicated file folder or binder specifically for insurance documents. Label it clearly and divide it into sections for different types of insurance, such as health, auto, or home. Keep it in a secure and easily accessible location, like a filing cabinet or a fireproof safe.

2

Digital Storage

Scan your insurance documents and save them as digital files. Create a separate folder on your computer, external hard drives, or cloud storage services, such as Google Drive or Dropbox, for insurance-related documents. Make sure to organize the files in a logical manner to help easily locate them in case of an emergency.

3

Online Accounts

Many insurance companies offer online portals where you can access and manage your policies. Consider creating an account with each insurance provider and save copies of your policy documents, correspondence, and invoices within those accounts. This way, you can access them whenever needed without relying on physical copies.

4

Mobile Apps

Some carriers will provide mobile apps that enable you to access your policy details and related documents on your smartphone. Check with your insurance advisor about which carriers offer such apps and utilize them for convenient access to your insurance paperwork on the go.

5

Safe Deposit Box

For critical insurance documents, like original policy papers, your will or trust documents, or other legal paperwork, you may wish to keep physical copies in a bank's safe deposit box. For a small annual fee, this ensures an extra layer of protection against theft, fire, or other disasters.

Remember to periodically review your insurance paperwork and discard any outdated or unnecessary documents to keep your storage system clutter-free and up to date. Also, create a contact in your mobile phone with your insurance advisor or agency's information. In case of emergency, you won't have to go searching. Our team of private risk management advisors is here to help you protect your now and your future.



[Contact us today to learn how we can support you.](#)

This material has been prepared for informational purposes only. BRP Group, Inc. and its affiliates, do not provide tax, legal or accounting advice. Please consult with your own tax, legal or accounting professionals before engaging in any transaction.



K&S INSURANCE
A BALDWIN RISK PARTNER