

The Essential American Expatriate's Checklist

To be prepared for any situation, we have created a comprehensive checklist of the most important documents you need as an American expat living in China.

With all these documents organized in a secure place, you will have full visibility of your situation and be able to get your estate and retirement plan in order.



Identity & Relationships

Identity

Passport

- Driving License
- Social Security Card
- Birth Certificate
- Death Certificate

Important Contacts

- Lawyer
- Investment Advisor
- Doctor

Healthcare

Automatically Renewing Medications

- Names of medications
 -] Name of pharmacy where medications are renewed
 - Name of doctor who prescribed medication

Insurance

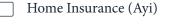
- Life Insurance
- Health Insurance

- Relationships
- Marriage Certificates
- Divorce Decrees
- Pet Guardian

- Accountant
 - Insurance Agent

Advanced Directive

- Living Will
- Health Care Proxy



US-based Property Insurances



Financial

Pension Plans and Retirement Benefit Information

401(K) Or 403(B) Plans IRAs Roth IRAs Simplified Employee Pension (SEP) Plan Salary Reduction Simplified Employee Pension (SARSEP) Plan

Credit & Debit Cards

] No International Fee Credit Card

- Card Details
- Recent Account Statements

US Debit Card Pin

China Debit Card Pin

Tax Returns

Most Recent W-2 Forms or Federal Self-Employment Tax Return	
Income Tax Returns for current and previous year	

L Including 1040s And 1099s

Gift Tax Returns

Mortgage or Loans (US/China Based)

- Company through which the mortgage or loan was given
- Copy of the mortgage or loan agreement

Bank Account Details

- Checking Account (China-based)
- Checking/Savings Account (US-based)
- Alipay Login
- Wechat Login

Investment Accounts

- China-friendly Brokerage (Interactive Brokers, Charles Schwab)
 - Username and password for online access
- 529 College Savings



Legal

Will

- Copy of the Will
- Copies of previous versions of the Will
- Contact details of Attorney or Law Firm that created your Will

Power of Attorney

- Name of person appointed to Power of Attorney
 - Power of Attorney Documentation
- Name of Attorney or Law Firm that helped create the PoA, if applicable

Home & Property

Household

- Rent Contract (including deposit info)
- Residence Document from Police Station
- Expenses

Electricity

- 🗌 Gas
- 🗌 Water
- D Phone
- Cable
- ☐ Internet
- 🗌 Ayi

Trusts

- Declarations of Trust or Trust Agreements
- Name of Attorney or Law Firm that created the Trust
- Bank Accounts associated with the Trust

Employment

- Work Permit/Visa
- Employment Contract

Titles or Deeds

- Real Estate
- Motor Vehicles and Boats



Safeguards

Hard Drives

Emergency Contacts

Police	110
Ambulance	120
Fire	119
Traffic Accidents	122
Lifeline (Mental Health Services)	400 821 1215

Scanned Copies

Passport
Work Permit/Visa
Residence Document from Police Station
Home Rent Contract

Digital

Online Businesses Logins

- 🗌 Taobao
- 🗌 Tmall
- Eleme
- Mobike/Ofo/Hellobike
- 🗌 Meituan
- L Amazon
- _ _ Paypal

Social Media Logins

- Wechat
- Douyin
- Linkedin

Email

- Gmail
- Hotmail
- 🗌 Yahoo! Mail
- Outlook

Cloud Storage

- 🗍 Nihao
- Weiyun