

Organize Your Records

Date:

Item Description	Where to Find it	Contact Person - Phone
Financial Records	Bank Statements:Checking, Money Markets, CDs	
	Loans: Auto, Mortgage, School	
	Lease: Auto, Residence, Equipment	
	Brokerage, Investment Accounts, Stock Certificates, Bonds	
	Retirement Plan Statements: 401(K), 403(B), Pension, Profit Sharing	
	Employee Stock Ownership	
	Social Security Numbers and Cards	
	Annual Earnings Statements, Pay Stubs, W-2	
	Income Tax Records: Maintain 7 Years Of History	
Insurance	Life Insurance Policy	
	Medical, Dental, Vision: Policies and Manuals	
	Personal Liability Umbrella: Policies, coverage details	
	Property and Casually: Homeowners, Renters	
	Other: Disability, Long Term Care	

Item Description	Where to Find it	Contact Person - Phone
General Records	Will	
	Living Will	
	Trust Agreements	
	Power Of Attorney	
	Health Care Proxy, Durable Power Of Attorney	
Legal Records	Property Deeds	
	Car Title	
	Birth / Death Certificate	
	Passport	
	Marriage Certificate / Divorce Papers	
	Military Discharge Papers, Military Service Record	
Other Records	Funeral Instructions, Cemetery Plot	
	Safe Depositi Box - Keep A Separate List Of Contents	
	Computer Files, User Names, Passwords (Online banking, Bill Payments, data Storage)	