Documents to Gather/Store/Share

This template can be used as a checklist for documents you should gather and store securely. In some cases, it might be beneficial to share with others. Always keep original documents. Make copies of the most important ones (marked with an \*) and have them certified. Store these separately, such as in a safe deposit box.

| Document | Share with |
| --- | --- |
| [ ]  Adoption or guardianship papers\* | Personal attorney, executor |
| [ ]  Annuity contracts | Financial advisor |
| [ ]  Bank account documents | Add name(s) |
| [ ]  Bank loan agreements | Add name(s) |
| [ ]  Bank statements | Add name(s) |
| [ ]  Birth certificates\* | Add name(s) |
| [ ]  Business licence\* | Add name(s) |
| [ ]  Cancelled checks | Add name(s) |
| [ ]  Cemetery deeds | Heir |
| [ ]  Citizen papers\* | Executor |
| [ ]  Credit card statements | Add name(s) |
| [ ]  Death certificates | Executor |
| [ ]  Degree and diploma certificates | Add name(s) |
| [ ]  Divorce decree and settlement papers | Personal attorney |
| [ ]  Employee benefits | Add name(s) |
| [ ]  Employment contract | Add name(s) |
| [ ]  Health or medical records | Family doctor |
| [ ]  Home improvement documents | Add name(s) |
| [ ]  House and real estate deeds and titles\* | Add name(s) |
| [ ]  Identity documents\* | Add name(s) |
| [ ]  Immunization records | Family doctor |
| [ ]  Insurance policies | Financial advisor |
| [ ]  Investment account statements/portfolios | Financial advisor |
| [ ]  Inventory of household items | Financial advisor |
| [ ]  Inventory of documents – use this checklist | Add name(s) |
| [ ]  Valuable possessions (art, jewelry, precious stones, etc.) valuation certificates | Executor |
| [ ]  Lawsuits | Personal attorney |
| [ ]  Letter of last instructions | Executor |
| [ ]  Marriage certificate | Executor |
| [ ]  Medical directives | Executor, heir |
| [ ]  Medical bills | Add name(s) |
| [ ]  Military discharge | Add name(s) |
| [ ]  Mortgage documents | Add name(s) |
| [ ]  Naturalization or immigration certification | Add name(s) |
| [ ]  Passports\* | Add name(s) |
| [ ]  Passwords | Add name(s) |
| [ ]  Pension plan documents | Financial advisor |
| [ ]  Powers of attorney | Family doctor, heir |
| [ ]  Prenuptial agreement\* | Add name(s) |
| [ ]  Property tax assessment | Add name(s) |
| [ ]  Property titles – boats, aircraft, etc. | Add name(s) |
| [ ]  Receipts of items under warranty | Add name(s) |
| [ ]  Receipts of very expensive items | Add name(s) |
| [ ]  Repeat medication prescription | Family pharmacist |
| [ ]  Retirement plan benefits | Financial advisor |
| [ ]  Safe deposit box inventory | Add name(s) |
| [ ]  Social security cards and statements | Financial advisor (statements) |
| [ ]  Stock and bond certificates | Add name(s) |
| [ ]  Tax deductibles – supporting documentation | Add name(s) |
| [ ]  Tax return with supporting documentation | Add name(s) |
| [ ]  Trust declarations or agreements | Executor, heir |
| [ ]  Vehicle repair receipts | Add name(s) |
| [ ]  Vehicle titles | Add name(s) |
| [ ]  Vehicle registration | Add name(s) |
| [ ]  Warranties with receipts | Add name(s) |
| [ ]  Will | Executor, heir |