Where our important papers are

A map for the family: where each paper is kept, not what it says.

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IDs and family records

DOCUMENT	WHOSE	WHERE THE ORIGINAL IS	COPY AT / WHO KNOWS
Birth certificates			
Passports			
Social Security cards			
Driver's licenses / state IDs			
Marriage or divorce papers			
Shot records			

Insurance

DOCUMENT	WHOSE	WHERE THE ORIGINAL IS	COPY AT / WHO KNOWS
Health insurance / Medicare			
Life insurance			
Home or renters			
Car			
Long-term care / disability			

Will and wishes

DOCUMENT	WHOSE	WHERE THE ORIGINAL IS	COPY AT / WHO KNOWS
Will or trust			
Power of attorney (money)			
Health care proxy / directive			
Guardian for the children			
Funeral wishes			
Letter of instruction			

Never write passwords, PINs or full account numbers on this sheet.

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Where our important papers are

Page 2: money, home and the people to call.

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Money and home

DOCUMENT	WHOSE	WHERE THE ORIGINAL IS	COPY AT / WHO KNOWS
Bank accounts (bank name only)			
Retirement / pension			
Tax returns (last 3 years)			
House deed or lease			
Mortgage papers			
Car titles			
Safe deposit box (bank, key)			

People to call

	NAME	PHONE	NOTES
Lawyer			
Accountant / tax preparer			
Financial advisor			
Insurance agent			
Employer benefits / HR			
Executor			
Trusted friend or neighbor			

Keys and the rest

SPARE HOUSE KEY IS WITH

HOME SAFE: WHO KNOWS HOW TO OPEN IT

PASSWORD MANAGER: WHO CAN GET IN

PHONE AND COMPUTER: WHO CAN UNLOCK

PETS: WHO TAKES THEM

LAST UPDATED

Tell one or two people where this sheet is. Update it once a year.

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