

ESSENTIAL INFORMATION

My name _____

Spouse name _____

Phone number _____ Phone passcode _____

Phone number _____ Phone passcode _____

Email _____ Email password _____

Email _____ Email password _____

Address _____

Location of all Documents _____

Consider attaching a picture where these documents are located

ACCOUNT INFORMATION

Type	Username	Password	Account Number	Bank/Credit Union Name	Additional Notes
Checking					
Saving					

FOREVER FILES

must
have!

Record	Name of Company or Contact Information	Policy or Account Number	Additional Notes
Birth certificate(s)			
Social security card(s)			
Will/Trust			Name of executor or administrator
Durable power of attorney	Person you have given POA		
Safe deposit box	Financial institution name and branch	Box #	Location of keys

OTHERS TO INCLUDE IN THIS CATETGORY

	Vehicle/boat title(s)
	Military paper(s)
	Death certificate(s) of family members
	Marriage document(s)
	Divorce document(s)
	Guardian/custodian paper(s)
	Passport(s)
	Medical directive(s)/health record(s)


CONTACTS

Name	Phone number
Attorney	
Financial Advisor	
Doctor	

TAX FILES

Record	Tax Service Username	Password	Additional Notes
Tax returns and records			


mark as you file! (7 years)

 MY TAX FILER

Name	Phone Number

 **what to toss!**


- tax records, W2s, and receipts from 7+ years ago

remember to shred!


LOANS

Record	Name of Company or Contact Information	Policy or Account Number	Additional Notes

 *mark as you file! (1-7 years)*

 **LOANS TO INCLUDE**

	Mortgage(s)
	Vehicle/boat loan(s)
	Personal loan(s)
	Credit cards & other debt(s)

-  **what to toss!**
- loan statements more than a year old

INVESTMENTS

Record	Name of Company or Contact Information	Policy or Account Number	Additional Notes

 *mark as you file! (1-7 years)*



RECORDS TO INCLUDE

	U.S. Savings Bonds
	Stocks
	Bonds
	Mutual funds
	Other assets

RETIREMENT

Record	Name of Company or Contact Information	Policy or Account Number	Additional Notes

 *mark as you file! (1-7 years)*



RECORDS TO INCLUDE

	Pension/retirement plan
	401(k) plan/other deferred compensation plan
	Profit sharing plan
	Individual Retirement Accounts

RECEIPTS / STATEMENTS & RECORDS

Record	Why/when to save
Deposit receipts	Until deposit clears
Mobile deposit checks	Until deposit clears
Credit card purchase receipts	Through return period
Vehicle registration	Keep current registration in glove compartment
Bank statements	Keep if you need to verify funds, for example if you're buying a home
Payslips	Keep if you need to verify income, for example if you're buying a home

 *mark as you file! (under 1 year)*

 *what to toss!*

- previous year's vehicle registration

Live confidently!



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Learn more about our financial videos, tools, and resources.