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 a	locuments are located

ACCOUNT INFORMATION					
Туре	Username	Password	Account Number	Bank/Credit Union Name	Additional Notes
Checking					
Saving					

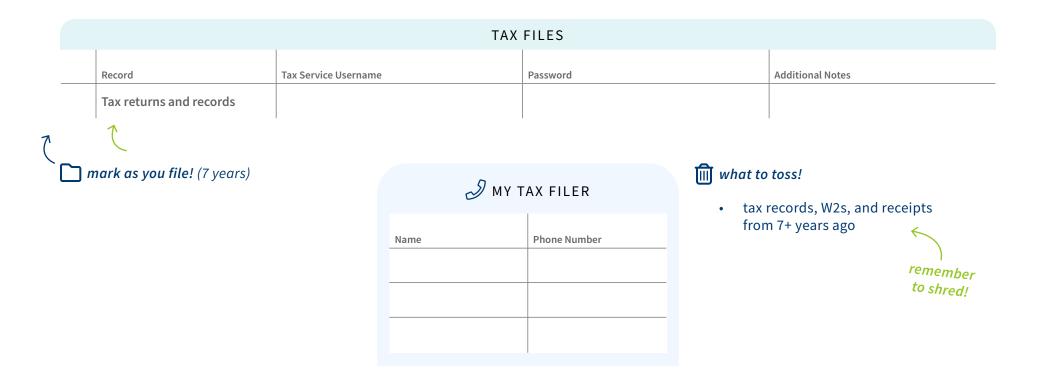


	FOREVER FILES			
must haves!	Record	Name of Company or Contact Information	Policy or Account Number	Additional Notes
(Birth certificate(s)			
3	Social security card(s)			
(Will/Trust			Name of executor or administrator
	Durable power of attorney	Person you have given POA		
	Safe deposit box	Financial 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)	

Name	Phone number
Attorney	
Financial Advisor	
Doctor	







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

mark as you file! (1-7 years)

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)

7

🔛 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)

7

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
Desposit 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.

