



Household Records Checklist

Physically gather your paper documents and check your computer for documents stored electronically. In the digital age, you might not receive printed financial statements from your bank or other accounts so in this step you should also gather up online account access information. (If you've never done a comprehensive audit of your papers and files, this could take the bulk of a weekend.) Use this chart during the gathering process to keep track of your progress.

Document Type	Format			Notes
	Paper	Computer File	Online	
Adoption Papers				
Advance Directives				
Bank Statements				
Bill Payment Receipts				
Bills to Pay				
Birth & Death Certificates				
Canceled Checks				
Citizenship Papers				
Contracts				
Credit Card Info				
Deeds & Titles				
Divorce Decrees				
Education Records				
Employment Records				
Health Records				
Home Purchase/Improvement Records				
Household Inventory List				
Insurance Policies (car, health, life, etc.)				

Document Type	Format			Notes
	Paper	Computer File	Online	
Investment Statements				
Investment Certificates				
Loan Statements & Payment Books				
Marriage or Civil Union Certificate				
Military Service Records				
Passports				
Password List				
Pay Stubs				
Power(s) of Attorney				
Receipts for Items Under Warranty				
Receipts for Large Purchases				
Safe Deposit Box Inventory and Key				
Service Contracts and Warranties				
Social Security Card(s)				
Social Security Statements				
Tax Receipts for the Current Year				
Tax Records from Previous Years				
Vehicle Title(s)				
Will				
Other Documents				