

IMPORTANT PAPERWORK CHECKLIST

IDENTIFICATION

- Birth Certificates
- Adoption Papers
- Death Certificates
- Passports/Green Cards/Visas
- Naturalization Docs
- Marriage Certificates, Divorce Papers
- Driver License/ ID
- Military ID
- Social Security Cards
- Church/ Baptismal Records

ESTATE PLANNING

- Will
- Living Will
- Power of Attorney
- Medical and Burial Instructions
- Beneficiary Directions

FINANCE

- Retirement Accounts (401k, IRA)
- Pension Plan
- Investments (Stocks, Bonds, Mutual Funds)
- Savings Bonds
- Bank/Credit Union Statement & Ledgers
- Credit Card/ Debit Card Docs
- Paystubs
- Unemployment
- Government Benefits (Social Security, Veterans, Disability)
- Alimony, Child Support, Elder Care
- College Tuition/ Student Loans
- HSA and FSA Accounts
- Insurance (Property, Life)

TAXES

- Annual Tax Returns
- W-2 and 1099 Forms
- Supporting Tax Docs
- Vehicle Tax
- Property Tax

REAL ESTATE

- Deed and Bill of Sale
- Mortgage Contract and Statements
- Utilities (Electric, Water, Gas, Cable)
- Home Improvement Receipts & Estimates
- Major Purchase Receipts
- Home Inventory

VEHICLE

- Title/Lease Docs
- Loan Payments
- Maintenance Receipts
- Insurance

HEALTH

- Medical & Dental Records
- Organ Donor Card
- Immunization Records
- Billing Statements
- Insurance Claims
- Receipts
- Pet Veterinarian Files & Bills

EDUCATION/EMPLOYMENT

- Degrees & Diplomas
- Transcripts/ Academic Records
- Salary & Promotion Letters
- Licenses/ Certifications/ Trainings
- Military Discharge Papers

OTHER

- Rewards (Frequent Flyers, Hotel, Car)
- Coupons, Vouchers, Gift Cards
- Online Passwords
- Jury Duty service
- Citations