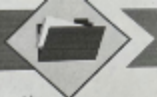


Documents to Store and Share



This template can be used as a checklist for documents you should store securely and share with others. Always keep original documents. Make copies of the most important ones (marked with an *) and have them certified. Store these separately, such as in a safe deposit box. Learn how to share files and password-protect them with OneDrive.

Document	Share with
<input type="checkbox"/> Adoption or guardianship papers*	Personal attorney, executor
<input checked="" type="checkbox"/> Annuity contracts	Financial advisor
<input checked="" type="checkbox"/> Bank account documents	Add name(s) <i>Ardak Sultan</i>
<input type="checkbox"/> Bank loan agreements	Add name(s)
<input checked="" type="checkbox"/> Bank statements	Add name(s) <i>Parvesh Giori</i>
<input type="checkbox"/> Birth certificates*	Add name(s)
<input checked="" type="checkbox"/> Business license*	Add name(s) <i>Jerome Rivard</i>
<input checked="" type="checkbox"/> Cancelled checks	Add name(s)
<input type="checkbox"/> Cemetery deeds	Heir
<input type="checkbox"/> Citizen papers*	Executor
<input checked="" type="checkbox"/> Credit card statements	Add name(s) <i>Marta Galvan</i>
<input checked="" type="checkbox"/> Death certificates	Executor
<input checked="" type="checkbox"/> Degree and diploma certificates	Add name(s)
<input type="checkbox"/> Divorce decree and settlement papers	Personal attorney <i>TBD</i>
<input type="checkbox"/> Employee benefits	Add name(s)
<input checked="" type="checkbox"/> Employment contract	Add name(s) <i>TBD</i>
<input type="checkbox"/> Health or medical records	Family doctor
<input type="checkbox"/> Home improvement documents	Add name(s)
<input checked="" type="checkbox"/> House and real estate deeds and titles*	Add name(s) <i>Not sure</i>
<input type="checkbox"/> Identity documents*	Add name(s)
<input type="checkbox"/> Immunization records	Family doctor
<input checked="" type="checkbox"/> Insurance policies	Financial advisor <i>Ask</i>
<input type="checkbox"/> Investment account statements/portfolios	Financial advisor
<input checked="" type="checkbox"/> Inventory of household items	Financial advisor <i>TBD</i>
<input type="checkbox"/> Inventory of documents – use this checklist	Add name(s)