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](https://www.microsoft.com/en-us/videoplayer/embed/RE264Cs)

| Document | | Share with |
| --- | --- | --- |
|  | Adoption or guardianship papers\* | Personal attorney, executor |
|  | Annuity contracts | Financial advisor |
|  | Bank account documents | Add name(s) |
|  | Bank loan agreements | Add name(s) |
|  | Bank statements | Add name(s) |
|  | Birth certificates\* | Add name(s) |
|  | Business license | Add name(s) |
|  | Cancelled checks | Add name(s) |
|  | Cemetery deeds | Heir |
|  | Citizen papers\* | Executor |
|  | Credit card statements | Add name(s) |
|  | Death certificates | Executor |
|  | Degree and diploma certificates | Add name(s) |
|  | Divorce decree and settlement papers | Personal attorney |
|  | Employee benefits | Add name(s) |
|  | Employment contract | Add name(s) |
|  | Health or medical records | Family doctor |
|  | Home improvement documents | Add name(s) |
|  | House and real estate deeds and titles\* | Add name(s) |
|  | Identity documents\* | Add name(s) |
|  | Immunization records | Family doctor |
|  | Insurance policies | Financial advisor |
|  | Investment account statements/portfolios | Financial advisor |
|  | [Inventory of household items](https://templates.office.com/en-us/Home-inventory-TM02802345) | Financial advisor |
|  | Inventory of documents – use this checklist | Add name(s) |
|  | Valuable possessions (art, jewelry, precious stones, etc.) valuation certificates | Executor |

1

| **Document** | | **Share with** |
| --- | --- | --- |
|  | Lawsuits | Personal attorney |
|  | Letter of last instructions | Executor |
|  | Marriage certificate | Executor |
|  | Medical directives | Executor, heir |
|  | Medical bills | Add name(s) |
|  | Military discharge | Add name(s) |
|  | Mortgage documents | Add name(s) |
|  | Naturalization or immigration certification | Add name(s) |
|  | Passports\* | Add name(s) |
|  | Passwords | Add name(s) |
|  | Pension plan documents | Financial advisor |
|  | Powers of attorney | Family doctor, heir |
|  | Prenuptial agreement\* | Add name(s) |
|  | Property tax assessment | Add name(s) |
|  | Property titles – boats, aircraft, etc. | Add name(s) |
|  | Receipts of items under warranty | Add name(s) |
|  | Receipts of very expensive items | Add name(s) |
|  | Repeat medication prescription | Family pharmacist |
|  | Retirement plan benefits | Financial advisor |
|  | Safe deposit box inventory | Add name(s) |
|  | Social security cards and statements | Financial advisor (statements) |
|  | Stock and bond certificates | Add name(s) |
|  | Tax deductibles – supporting documentation | Add name(s) |
|  | Tax return with supporting documentation | Add name(s) |
|  | Trust declarations or agreements | Executor, heir |
|  | Vehicle repair receipts | Add name(s) |
|  | Vehicle titles | Add name(s) |
|  | Vehicle registration | Add name(s) |
|  | Warranties with receipts | Add name(s) |
|  | Will | Executor, heir |
|  |  |  |

2