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 licence\* | 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 |
| [ ]  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 |