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 |