

Organizing Your Important Documents Index

PERSONAL & FAMILY INFORMATION

I. Whole Family

- ⤴ Phone Numbers and Addresses
 - Household
 - Extended Family
- ⤴ Marriage Certificate

II. Individuals

- ⤴ Master Page
- ⤴ Birth Certificate
- ⤴ Social Security Card
- ⤴ Copy of Driver's License
- ⤴ Passport
- ⤴ Any other individual documents

III. Whole Family Medical

- ⤴ Medical, dental, and vision insurance information
 - Copies of insurance cards
- ⤴ Contact information for medical professionals, urgent care, hospital, and pharmacy

IV. Individual Medical

- ⤴ Master Page
- ⤴ Immunization Records
- ⤴ Other medical papers or records

V. Personal Preparedness

- ⤴ Estate documents
- ⤴ Life Insurance
 - Life Insurance policy
 - Agent/company contact information
 - Due dates and amount due
 - Receipts
- ⤴ Funeral information, deeds for burial plots, etc.

VI. Pets

- ⤴ Veterinarian contact information
- ⤴ Pet medical and vaccination records
- ⤴ Pet license and registration information

FINANCIAL AND OTHER ACCOUNTS

I. Banks

- ⤴ Bank contact information
- ⤴ List of accounts
- ⤴ Any other bank information

II. Debit Cards

- ⤴ List of all debit cards and information
 - Bank and account card is for
 - Description of card
 - Account number
 - Security code
 - PIN
 - Major backing company (ie: Visa or Master Card)
 - 24-hour emergency contact phone number
 - Website, log-in information, and answers to security questions
 - Copy of card

III. Bills

- ⤴ List of all bill accounts
 - Company name and contact information
 - Account number
 - Website, log-in information, answers to security questions, and online bill pay information
- ⤴ Copy of your typical monthly budget

IV. Income, Investments, and Retirement Information

- ⤴ Income
 - Sources of income
 - Pay frequency
 - Company contact information
 - Payroll/HR contact information
- ⤴ List of all retirement accounts
 - Company name and contact information
 - Account number
 - Website, log-in information, and answers to security questions
 - Most recent account statement
- ⤴ All pertinent information regarding non-retirement investments

V. Other Accounts or Memberships

- ⤴ List of all other accounts or memberships

VI. Professional Services:

- ⤴ Professional services contacts

FINANCIAL AND OTHER ACCOUNTS CONTINUED

VII. The Big Three

- ⤴ Contact information for Equifax, TransUnion, and Experian
- ⤴ Copy of most recent credit report
- ⤴ Any other Big Three documents

VIII. Income Tax Information

- ⤴ Copy of most recent tax return
- ⤴ PIN's for signing returns electronically
- ⤴ Tax information or documents collected throughout the year

PROPERTY

I. Home

- ⤴ Property Deed or Lease/Rental Agreement
- ⤴ Mortgage/lease information
 - Mortgage/lease holder name and contact information
 - Monthly payment amount and due date
 - Start date and term length of mortgage/lease
- ⤴ Home or Rental Insurance Policy, and agent contact information
- ⤴ Property Tax information
- ⤴ Inventory of major household items
 - Item description
 - Serial Number
 - Year purchased
 - Replacement value and receipt
 - Warranty and repair information
- ⤴ List of major renovations or upgrades
 - Project
 - Date
 - Cost
 - Contractor's contact information (if applicable)

II. Vehicles

- ⤴ Vehicle Title
- ⤴ Insurance
 - Insurance company and agent contact information
 - Policy
 - COPY of your insurance ID card
- ⤴ Motor Vehicle Division information and COPY of vehicle registration
- ⤴ Maintenance/repair receipts
- ⤴ Any other vehicle documents

III. Computer

- ⤴ Computer backup
- ⤴ Software registrations and key codes
- ⤴ Wi-Fi password

IV. Electronics

- ⤴ Inventory of electronic items
 - Item description
 - Serial Number
 - Year purchased
 - Replacement value and receipt
 - Warranty and repair information