

# Every House Should File These...

<p>√ <b>IDENTIFICATION</b></p> <p><b>CERTIFICATES</b>          Birth certificate          Educational Certificate          Religious certificates          Marriage certificate          Death certificate</p> <p><b>IDENTIFICATION RECORDS</b>          Social Security Card          Copy of driver's license          Copy of identification card          Passport (and a copy)          Recent Photo</p> <p><b>LEGAL RECORDS</b>          Adoption records            Custody agreements          Separation/divorce records</p> <p><b>CITIZENSHIP &amp; MILITARY</b>          Military records            Immigration records          Naturalization records</p> <p><b>PET RECORDS</b>          Pet's photo          Birth/breeding documents          Vaccination record          Pet license          Pet medication</p>	<p>√ <b>HEALTH &amp; MEDICAL</b></p> <p><b>MEDICAL INFORMATION</b>          Immunization record          Health History Card          Prescription Information</p> <p><b>HEALTH INSURANCE</b>          Copy of insurance cards          Medical Insurance          Dental Insurance          Prescription Insurance          Vision Insurance          Medicare information          Medicaid information</p> <p><b>LIFE &amp; OTHER INSURANCE</b>          Life Insurance            Accidental Death Insurance          Disability Insurance          Long-term Care Insurance          Beneficiary designations</p> <p><b>HEALTH CARE PLANNING</b>          Living Will          Durable Power of Attorney for Health Care</p>	<p>√ <b>FINANCE &amp; PROPERTY</b></p> <p><b>BANK ACCOUNTS</b>          Checking account statement          Savings account statement          Certificate of deposit          Safe deposit box information</p> <p><b>CREDIT CARD INFORMATION</b>          Visa Statement          MasterCard statement          AMEX statement          Discover Statement          Gas card Statement          Store credit card statement          Credit Report</p> <p><b>INVESTMENTS</b>            Investment account statement          Stock certificates          Bonds or Treasury securities          College Savings Plan</p> <p><b>RETIREMENT DOCUMENTS</b>          IRA documents            Annuity documents          Retirement plan documents          Beneficiary designations          Social Security documents</p> <p><b>LEASES</b>          Residential lease          Vehicle lease</p> <p><b>LOANS</b>          Vehicle loan          Home-equity line of credit          Consumer loan          Student loan</p>	<p>√ <b>FINANCE &amp; PROPERTY</b></p> <p><b>HOME OWNERSHIP</b>          Closing statement          Deed          Mortgage          Title Insurance</p> <p><b>HOUSEHOLD RECORDS</b>          Record of home improvements          Photos of home          Utility bills</p> <p><b>VEHICLES</b>          Bill of Sale          Certificate of Title          DMV registration (copy)          Warranty documents</p> <p><b>TIMESHARE OWNERSHIP</b>          Timeshare agreement          Note payable</p> <p><b>PERSONAL POSSESSIONS</b>          Appraisals            Household Inventory          Photos of items</p> <p><b>VALUABLES &amp; COLLECTIBLES</b>          Appraisals          Valuables &amp; collectibles          Photos of items</p> <p><b>BUSINESS AGREEMENTS</b>          Partnership agreement          LLC agreement          Buy/sell agreement</p> <p><b>EMPLOYMENT AGREEMENTS</b>          Employment contract          Stock option agreement</p>	<p>√ <b>INSURANCE</b></p> <p><b>PROPERTY INSURANCE</b>          Homeowner's insurance          Renter's Insurance          Umbrella liability insurance          Personal articles rider</p> <p><b>VEHICLE INSURANCE</b>          Automobile insurance          Motorcycle Insurance          Boat Insurance          RV Insurance</p> <p><b>DISASTER INSURANCE</b>          Earthquake insurance          Flood Insurance          Hurricane and windstorm</p> <p><b>ESTATE PLANNING &amp; TAXES</b></p> <p><b>ESTATE PLANNING</b>          Will          Durable Power of Attorney for Mgmt of Property &amp; Personal Affairs          Final wishes            Cemetery plot deed</p> <p><b>TRUST DOCUMENTS</b>          Living trust          Affidavit of trust          Property agreement</p> <p><b>TAX RETURNS</b>          Federal tax return (2 prior yrs)          State tax return (2 prior yrs)          W-2 Form(s)</p> <p><b>OTHER TAX INFORMATION</b>          IRS Form 2119          Info on Carryforwards</p>
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