

Organizing Your Important Records



Good for you and your loved ones.

Organizing your financial documents and other important records is an important step to keeping your finances on track and giving you peace of mind. Imagine finding what you're looking for without the added frustration of sorting through mounds of paperwork or files. Being organized will also benefit your loved ones if they have a need to access your information should you become ill or pass away.

Storing Your Documents

While we live in an electronic age, chances are you still have important physical documents that you need to maintain. Knowing how to securely file and store documents physically and electronically is essential to avoiding identity theft.

For your physical documents, consider a fireproof lock box or safe - preferably one that is bolted to the floor or not easily carried. Keep the safe somewhere that is out of sight but convenient enough you'll still have access.

When storing your records electronically, ensure that your device has the most up-to-date security software, operating system, and web browser. You may also consider encrypting your computer, to ensure only authorized individuals with the proper credentials can access your device. Asking a technician to help you set up disk encryption can give you an added layer of security and peace of mind.

Remember, always secure your devices and accounts with strong, unique passwords. Consider using a password manager to store your login credentials and passwords.

Documents Checklist

Legal Identification Documents

- Social Security Card
- Naturalization Papers
- Birth Certificates
- Adoption Paperwork
- Passports
- Copy of Driver's Licenses
- Marriage/Divorce Papers
- Alimony or Child Support Documents

Tax Documents

- Previous Year's Tax Return
- W2s & 1099s

Property Documents

- Vehicle Registration and Titles
- Mortgage Statements, Deeds, Bills of Sale
- Insurance Policies – Home, Life, Auto
- Professional Appraisals

Medical Records

- Wills (Actual & Living)
- Trust Documents
- Power of Attorney
- Medical Bills
- Burial Instructions
- Health Insurance Policy
- Vaccine Records

Financial Account Information & Documents

- Pay Stubs
- Bank Statements
- Previous Month's Credit Card Statements
- Utility and Other Billing Statements
- Unemployment & Disability Records
- Retirement/Pension Plans
- Updated payable on death (POD) and transfer on death (TOD) information