Important DOCUMENTS CHECKLIST

WHAT YOU HAVE, WHERE IT IS KEPT, WHO ELSE KNOWS

IDS AND RECORDS *for each person*

	DOCUMENT	KEPT IN	COPY
☐	Birth certificates		○
☐	Social Security cards		○
☐	Passports		○
☐	Driver's licenses		○
☐	Marriage certificate		○
☐	Citizenship papers		○
☐	Adoption papers		○
☐			○

HOME AND CAR *spare keys count too*

	DOCUMENT	KEPT IN	COPY
☐	Deed or lease		○
☐	Mortgage papers		○
☐	Property tax records		○
☐	Car titles		○
☐	Car registration		○
☐	Warranties and manuals		○
☐	Spare keys		○
☐			○

MONEY *names only, never numbers*

	DOCUMENT	KEPT IN	COPY
☐	Bank and card list		○
☐	Tax returns		○
☐	Recent pay stubs		○
☐	Retirement accounts		○
☐	Loan papers		○
☐	Will or trust		○
☐	Safe deposit box key		○
☐			○

HEALTH *one list for each person*

	DOCUMENT	KEPT IN	COPY
☐	Medication list		○
☐	Vaccination records		○
☐	Allergy list		○
☐	Doctor and dentist list		○
☐	Health care proxy		○
☐	Advance directive		○
☐	School health forms		○
☐			○

INSURANCE *know who to call*

	DOCUMENT	KEPT IN	COPY
☐	Health insurance cards		○
☐	Dental and vision cards		○
☐	Home or renter's policy		○
☐	Car policy		○
☐	Life insurance policy		○
☐	Claims phone numbers		○
☐	Other policies		○
☐			○

DIGITAL *never write a password here*

	DOCUMENT	KEPT IN	COPY
☐	Password manager		○
☐	Recovery codes		○
☐	Email accounts		○
☐	Phone and photo backups		○
☐	Scans of these papers		○
☐	Banking apps		○
☐	Utility accounts		○
☐			○

◆ HOW TO USE

Tick each paper you have and write where the original is kept: the fire safe, the blue folder, the bank box. Tick Copy once it is scanned. Never write passwords or account numbers here.

WHO ELSE KNOWS *where this page is*

NAME _____

PHONE _____

CHECKED _____ _____ _____

Know where it is before you need it.

ORDERLY WEEK

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Important DOCUMENTS CHECKLIST

TICK WHAT YOU HAVE, THEN WRITE WHERE EACH SET IS KEPT

1 IDS AND RECORDS

For each person

- [ ] Birth certificates
- [ ] Social Security cards
- [ ] Passports
- [ ] Driver's licenses
- [ ] Marriage certificate
- [ ] Citizenship papers
- [ ] Adoption papers

KEPT IN _____

2 HOME AND CAR

Spare keys count too

- [ ] Deed or lease
- [ ] Mortgage papers
- [ ] Property tax records
- [ ] Car titles
- [ ] Car registration
- [ ] Warranties and manuals
- [ ] Spare keys

KEPT IN _____

3 MONEY

Names only, never numbers

- [ ] Bank and card list
- [ ] Tax returns
- [ ] Recent pay stubs
- [ ] Retirement accounts
- [ ] Loan papers
- [ ] Will or trust
- [ ] Safe deposit box key

KEPT IN _____

4 HEALTH

One list for each person

- [ ] Medication list
- [ ] Vaccination records
- [ ] Allergy list
- [ ] Doctor and dentist list
- [ ] Health care proxy
- [ ] Advance directive
- [ ] School health forms

KEPT IN _____

5 INSURANCE

Know who to call

- [ ] Health insurance cards
- [ ] Dental and vision cards
- [ ] Home or renter's policy
- [ ] Car policy
- [ ] Life insurance policy
- [ ] Claims phone numbers
- [ ] Other policies

KEPT IN _____

6 DIGITAL

Never write a password here

- [ ] Password manager
- [ ] Recovery codes
- [ ] Email accounts
- [ ] Phone and photo backups
- [ ] Scans of these papers
- [ ] Banking apps
- [ ] Utility accounts

KEPT IN _____

HOW TO USE

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Household
ADMIN DASHBOARD

BILLS, RENEWALS, CALLS AND PAPERS, WEEK BY WEEK — WEEK OF _____

THREE ADMIN JOBS THIS WEEK

Circle a day for each.

1 _____ M T W T F S S

2 _____ M T W T F S S

3 _____ M T W T F S S

BILLS DUE

what, and the due date

_____ DONE ____

_____ DONE ____

_____ DONE ____

_____ DONE ____

_____ DONE ____

RENEWALS AND DATES

insurance, car, school, checkups

_____ DATE ____

_____ DATE ____

_____ DATE ____

_____ DATE ____

_____ DATE ____

CALLS AND EMAILS

book, confirm, call back, reply

- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

PAPERS TO FILE

file it, scan it or shred it

- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____
- [ ] _____

MAIL OPENED

M ○ T ○ W ○ T ○ F ○ S ○ S ○

Waiting on _____

NOTES

_____

_____

_____

◆ HOW TO USE

At your Weekly Reset, open the mail and fill in this page. Write each bill with its due date and tick Done once you pay it. Pick three admin jobs and circle a day for each. Never write passwords or account numbers here.

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12-Month
BILL TRACKER

EVERY BILL, EVERY MONTH, ONE TICK EACH

BILLS *Tick the month when it is paid*

	DUE	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
BILL _____	____	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

ON AUTOPAY

and the day it comes out

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

HOW TO USE

List each bill once, with the day it is due. Tick its month when it is paid. Keep this page at the front of your home binder and look at it at the Weekly Reset.

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TICK WHAT YOU HAVE, THEN WRITE WHERE EACH SET IS KEPT

IMPORTANT DOCUMENTS *Checklist*



1 IDS AND RECORDS

For each person

- [ ] Birth certificates
- [ ] Social Security cards
- [ ] Passports
- [ ] Driver's licenses
- [ ] Marriage certificate
- [ ] Citizenship papers
- [ ] Adoption papers

KEPT IN _____



2 HOME AND CAR

Spare keys count too

- [ ] Deed or lease
- [ ] Mortgage papers
- [ ] Property tax records
- [ ] Car titles
- [ ] Car registration
- [ ] Warranties and manuals
- [ ] Spare keys

KEPT IN _____



3 MONEY

Names only, never numbers

- [ ] Bank and card list
- [ ] Tax returns
- [ ] Recent pay stubs
- [ ] Retirement accounts
- [ ] Loan papers
- [ ] Will or trust
- [ ] Safe deposit box key

KEPT IN _____



4 HEALTH

One list for each person

- [ ] Medication list
- [ ] Vaccination records
- [ ] Allergy list
- [ ] Doctor and dentist list
- [ ] Health care proxy
- [ ] Advance directive
- [ ] School health forms

KEPT IN _____



5 INSURANCE

Know who to call

- [ ] Health insurance cards
- [ ] Dental and vision cards
- [ ] Home or renter's policy
- [ ] Car policy
- [ ] Life insurance policy
- [ ] Claims phone numbers
- [ ] Other policies

KEPT IN _____



6 DIGITAL

Never write a password here

- [ ] Password manager
- [ ] Recovery codes
- [ ] Email accounts
- [ ] Phone and photo backups
- [ ] Scans of these papers
- [ ] Banking apps
- [ ] Utility accounts

KEPT IN _____

◆ HOW TO USE

Tick each paper you have and write where the original is kept: the fire safe, the blue folder, the bank box. Never write passwords or account numbers here.

WHO ELSE KNOWS *where this page is*

NAME _____

PHONE _____

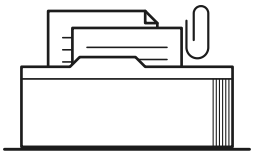
CHECKED _____ _____ _____

Know where it is before you need it.

ORDERLY WEEK

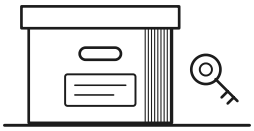
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IMPORTANT

DOCUMENTS CHECKLIST



For Whoever Keeps the Papers

1 IDS AND RECORDS *for each person*

	DOCUMENT	KEPT IN	COPY
☐	Birth certificates		○
☐	Social Security cards		○
☐	Passports		○
☐	Driver's licenses		○
☐	Marriage certificate		○
☐	Citizenship papers		○
☐	Adoption papers		○
☐			○

2 HOME AND CAR *spare keys count too*

	DOCUMENT	KEPT IN	COPY
☐	Deed or lease		○
☐	Mortgage papers		○
☐	Property tax records		○
☐	Car titles		○
☐	Car registration		○
☐	Warranties and manuals		○
☐	Spare keys		○
☐			○

3 MONEY *names only, never numbers*

	DOCUMENT	KEPT IN	COPY
☐	Bank and card list		○
☐	Tax returns		○
☐	Recent pay stubs		○
☐	Retirement accounts		○
☐	Loan papers		○
☐	Will or trust		○
☐	Safe deposit box key		○
☐			○

4 HEALTH *one list for each person*

	DOCUMENT	KEPT IN	COPY
☐	Medication list		○
☐	Vaccination records		○
☐	Allergy list		○
☐	Doctor and dentist list		○
☐	Health care proxy		○
☐	Advance directive		○
☐	School health forms		○
☐			○

5 INSURANCE *know who to call*

	DOCUMENT	KEPT IN	COPY
☐	Health insurance cards		○
☐	Dental and vision cards		○
☐	Home or renter's policy		○
☐	Car policy		○
☐	Life insurance policy		○
☐	Claims phone numbers		○
☐	Other policies		○
☐			○

6 DIGITAL *never write a password here*

	DOCUMENT	KEPT IN	COPY
☐	Password manager		○
☐	Recovery codes		○
☐	Email accounts		○
☐	Phone and photo backups		○
☐	Scans of these papers		○
☐	Banking apps		○
☐	Utility accounts		○
☐			○

HOW TO USE

Tick each paper you have and write where the original is kept: the fire safe, the blue folder, the bank box. Tick Copy once it is scanned. Never write passwords or account numbers here.

WHO ELSE KNOWS *where this page is*

NAME _____

PHONE _____

CHECKED _____ _____ _____

Know where it is before you need it.

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Important Documents Checklist

Tick what you have, then write where each set is kept

1 IDS AND RECORDS

For each person

- ○ Birth certificates
- ○ Social Security cards
- ○ Passports
- ○ Driver's licenses
- ○ Marriage certificate
- ○ Citizenship papers
- ○ Adoption papers

KEPT IN .....

2 HOME AND CAR

Spare keys count too

- ○ Deed or lease
- ○ Mortgage papers
- ○ Property tax records
- ○ Car titles
- ○ Car registration
- ○ Warranties and manuals
- ○ Spare keys

KEPT IN .....

3 MONEY

Names only, never numbers

- ○ Bank and card list
- ○ Tax returns
- ○ Recent pay stubs
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KEPT IN .....

4 HEALTH

One list for each person

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- ○ Advance directive
- ○ School health forms

KEPT IN .....

5 INSURANCE

Know who to call

- ○ Health insurance cards
- ○ Dental and vision cards
- ○ Home or renter's policy
- ○ Car policy
- ○ Life insurance policy
- ○ Claims phone numbers
- ○ Other policies

KEPT IN .....

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- ○ Password manager
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KEPT IN .....

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IMPORTANT
Documents Checklist

WHAT YOU HAVE, WHERE IT IS KEPT, WHO ELSE KNOWS

IDS AND RECORDS *for each person*

	DOCUMENT	KEPT IN	COPY
☐	Birth certificates		○
☐	Social Security cards		○
☐	Passports		○
☐	Driver's licenses		○
☐	Marriage certificate		○
☐	Citizenship papers		○
☐	Adoption papers		○
☐			○

HOME AND CAR *spare keys count too*

	DOCUMENT	KEPT IN	COPY
☐	Deed or lease		○
☐	Mortgage papers		○
☐	Property tax records		○
☐	Car titles		○
☐	Car registration		○
☐	Warranties and manuals		○
☐	Spare keys		○
☐			○

MONEY *names only, never numbers*

	DOCUMENT	KEPT IN	COPY
☐	Bank and card list		○
☐	Tax returns		○
☐	Recent pay stubs		○
☐	Retirement accounts		○
☐	Loan papers		○
☐	Will or trust		○
☐	Safe deposit box key		○
☐			○

HEALTH *one list for each person*

	DOCUMENT	KEPT IN	COPY
☐	Medication list		○
☐	Vaccination records		○
☐	Allergy list		○
☐	Doctor and dentist list		○
☐	Health care proxy		○
☐	Advance directive		○
☐	School health forms		○
☐			○

INSURANCE *know who to call*

	DOCUMENT	KEPT IN	COPY
☐	Health insurance cards		○
☐	Dental and vision cards		○
☐	Home or renter's policy		○
☐	Car policy		○
☐	Life insurance policy		○
☐	Claims phone numbers		○
☐	Other policies		○
☐			○

DIGITAL *never write a password here*

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WHO ELSE KNOWS *where this page is*

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CHECKED _____ _____ _____

Know where it is before you need it.

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Important
DOCUMENTS CHECKLIST

Every Paper Has a Place

1 IDS AND RECORDS

For each person

- [ ] Birth certificates
- [ ] Social Security cards
- [ ] Passports
- [ ] Driver's licenses
- [ ] Marriage certificate
- [ ] Citizenship papers
- [ ] Adoption papers

KEPT IN _____

2 HOME AND CAR

Spare keys count too

- [ ] Deed or lease
- [ ] Mortgage papers
- [ ] Property tax records
- [ ] Car titles
- [ ] Car registration
- [ ] Warranties and manuals
- [ ] Spare keys

KEPT IN _____

3 MONEY

Names only, never numbers

- [ ] Bank and card list
- [ ] Tax returns
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- [ ] Will or trust
- [ ] Safe deposit box key

KEPT IN _____

4 HEALTH

One list for each person

- [ ] Medication list
- [ ] Vaccination records
- [ ] Allergy list
- [ ] Doctor and dentist list
- [ ] Health care proxy
- [ ] Advance directive
- [ ] School health forms

KEPT IN _____

5 INSURANCE

Know who to call

- [ ] Health insurance cards
- [ ] Dental and vision cards
- [ ] Home or renter's policy
- [ ] Car policy
- [ ] Life insurance policy
- [ ] Claims phone numbers
- [ ] Other policies

KEPT IN _____

6 DIGITAL

Never write a password here

- [ ] Password manager
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Important Documents

CHECKLIST

WHAT YOU HAVE, WHERE IT IS KEPT, WHO ELSE KNOWS

IDS AND RECORDS *for each person*

	DOCUMENT	KEPT IN	COPY
☐	Birth certificates		○
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☐	Driver's licenses		○
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☐	Citizenship papers		○
☐	Adoption papers		○
☐			○

HOME AND CAR *spare keys count too*

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HEALTH *one list for each person*

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INSURANCE *know who to call*

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WHO ELSE KNOWS *where this page is*

NAME _____

PHONE _____

CHECKED _____ _____ _____

KNOW WHERE IT IS
BEFORE YOU NEED IT.

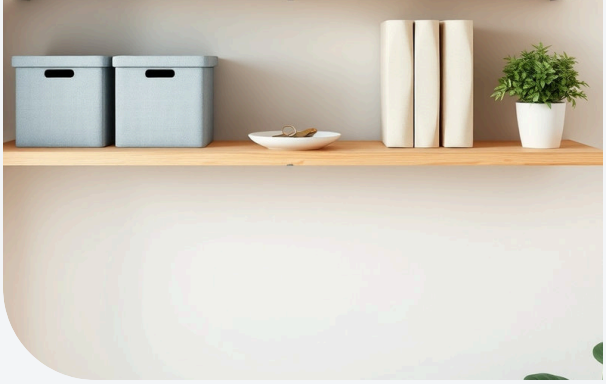
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WHAT YOU HAVE, WHERE IT IS KEPT, WHO ELSE KNOWS

Important Documents Checklist



IDS AND RECORDS *for each person*

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☐	Citizenship papers		○
☐	Adoption papers		○
☐			○

HOME AND CAR *spare keys count too*

	DOCUMENT	KEPT IN	COPY
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HEALTH *one list for each person*

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INSURANCE *know who to call*

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☐	Home or renter's policy		○
☐	Car policy		○
☐	Life insurance policy		○
☐	Claims phone numbers		○
☐	Other policies		○
☐			○

DIGITAL *never write a password here*

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☐	Utility accounts		○
☐			○

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WHO ELSE KNOWS *where this page is*

NAME _____

PHONE _____

CHECKED _____ _____ _____

Know where it is before you need it.

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TICK WHAT YOU HAVE, THEN WRITE WHERE EACH SET IS KEPT

IMPORTANT DOCUMENTS

CHECKLIST

1 IDS AND RECORDS — FOR EACH PERSON

KEPT IN _____

- ○ Birth certificates
- ○ Social Security cards
- ○ Passports
- ○ Driver's licenses
- ○ Marriage certificate
- ○ Citizenship papers
- ○ Adoption papers

2 HOME AND CAR — SPARE KEYS COUNT TOO

KEPT IN _____

- ○ Deed or lease
- ○ Mortgage papers
- ○ Property tax records
- ○ Car titles
- ○ Car registration
- ○ Warranties and manuals
- ○ Spare keys

3 MONEY — NAMES ONLY, NEVER NUMBERS

KEPT IN _____

- ○ Bank and card list
- ○ Tax returns
- ○ Recent pay stubs
- ○ Retirement accounts
- ○ Loan papers
- ○ Will or trust
- ○ Safe deposit box key

4 HEALTH — ONE LIST FOR EACH PERSON

KEPT IN _____

- ○ Medication list
- ○ Vaccination records
- ○ Allergy list
- ○ Doctor and dentist list
- ○ Health care proxy
- ○ Advance directive
- ○ School health forms

5 INSURANCE — KNOW WHO TO CALL

KEPT IN _____

- ○ Health insurance cards
- ○ Dental and vision cards
- ○ Home or renter's policy
- ○ Car policy
- ○ Life insurance policy
- ○ Claims phone numbers
- ○ Other policies

6 DIGITAL — NEVER WRITE A PASSWORD HERE

KEPT IN _____

- ○ Password manager
- ○ Recovery codes
- ○ Email accounts
- ○ Phone and photo backups
- ○ Scans of these papers
- ○ Banking apps
- ○ Utility accounts

HOW TO USE

Tick each paper you have and write where the original is kept: the fire safe, the blue folder, the bank box. Never write passwords or account numbers here.

WHO ELSE KNOWS *where this page is*

NAME _____

PHONE _____

CHECKED _____ _____ _____

Know where it is before you need it.

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Household
ADMIN DASHBOARD
The Week's Paperwork in One Place

WEEK OF _____

THREE ADMIN JOBS THIS WEEK
Circle a day for each.

1. _____ M T W T F S S
2. _____ M T W T F S S
3. _____ M T W T F S S

BILLS DUE
what, and the due date

_____ DONE ____
_____ DONE ____
_____ DONE ____
_____ DONE ____
_____ DONE ____

RENEWALS AND DATES
insurance, car, school, checkups

_____ DATE ____
_____ DATE ____
_____ DATE ____
_____ DATE ____
_____ DATE ____

CALLS AND EMAILS
book, confirm, call back, reply

- ○ _____
- ○ _____
- ○ _____
- ○ _____
- ○ _____

PAPERS TO FILE
file it, scan it or shred it

- ○ _____
- ○ _____
- ○ _____
- ○ _____
- ○ _____

MAIL OPENED

○ M ○ T ○ W ○ T ○ F ○ S ○ S

Waiting on _____

NOTES

_____
_____
_____

HOW TO USE

At your Weekly Reset, open the mail and fill in this page. Write each bill with its due date and tick Done once you pay it. Pick three admin jobs and circle a day for each. Never write passwords or account numbers here.

Open it, plan it, file it.

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TICK WHAT YOU HAVE, THEN WRITE WHERE EACH SET IS KEPT

IMPORTANT

DOCUMENTS CHECKLIST

1 IDS AND RECORDS

For each person

- ○ Birth certificates
- ○ Social Security cards
- ○ Passports
- ○ Driver's licenses
- ○ Marriage certificate
- ○ Citizenship papers
- ○ Adoption papers

KEPT IN _____

2 HOME AND CAR

Spare keys count too

- ○ Deed or lease
- ○ Mortgage papers
- ○ Property tax records
- ○ Car titles
- ○ Car registration
- ○ Warranties and manuals
- ○ Spare keys

KEPT IN _____

3 MONEY

Names only, never numbers

- ○ Bank and card list
- ○ Tax returns
- ○ Recent pay stubs
- ○ Retirement accounts
- ○ Loan papers
- ○ Will or trust
- ○ Safe deposit box key

KEPT IN _____

4 HEALTH

One list for each person

- ○ Medication list
- ○ Vaccination records
- ○ Allergy list
- ○ Doctor and dentist list
- ○ Health care proxy
- ○ Advance directive
- ○ School health forms

KEPT IN _____

5 INSURANCE

Know who to call

- ○ Health insurance cards
- ○ Dental and vision cards
- ○ Home or renter's policy
- ○ Car policy
- ○ Life insurance policy
- ○ Claims phone numbers
- ○ Other policies

KEPT IN _____

6 DIGITAL

Never write a password here

- ○ Password manager
- ○ Recovery codes
- ○ Email accounts
- ○ Phone and photo backups
- ○ Scans of these papers
- ○ Banking apps
- ○ Utility accounts

KEPT IN _____

HOW TO USE

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WHO ELSE KNOWS *where this page is*

NAME _____

PHONE _____

CHECKED _____ _____ _____

Know where it is before you need it.

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Important
DOCUMENTS CHECKLIST

WHAT YOU HAVE, WHERE IT IS KEPT, WHO ELSE KNOWS

IDS AND RECORDS *for each person*

	DOCUMENT	KEPT IN	COPY
☐	Birth certificates		○
☐	Social Security cards		○
☐	Passports		○
☐	Driver's licenses		○
☐	Marriage certificate		○
☐	Citizenship papers		○
☐	Adoption papers		○
☐			○

HOME AND CAR *spare keys count too*

	DOCUMENT	KEPT IN	COPY
☐	Deed or lease		○
☐	Mortgage papers		○
☐	Property tax records		○
☐	Car titles		○
☐	Car registration		○
☐	Warranties and manuals		○
☐	Spare keys		○
☐			○

MONEY *names only, never numbers*

	DOCUMENT	KEPT IN	COPY
☐	Bank and card list		○
☐	Tax returns		○
☐	Recent pay stubs		○
☐	Retirement accounts		○
☐	Loan papers		○
☐	Will or trust		○
☐	Safe deposit box key		○
☐			○

HEALTH *one list for each person*

	DOCUMENT	KEPT IN	COPY
☐	Medication list		○
☐	Vaccination records		○
☐	Allergy list		○
☐	Doctor and dentist list		○
☐	Health care proxy		○
☐	Advance directive		○
☐	School health forms		○
☐			○

INSURANCE *know who to call*

	DOCUMENT	KEPT IN	COPY
☐	Health insurance cards		○
☐	Dental and vision cards		○
☐	Home or renter's policy		○
☐	Car policy		○
☐	Life insurance policy		○
☐	Claims phone numbers		○
☐	Other policies		○
☐			○

DIGITAL *never write a password here*

	DOCUMENT	KEPT IN	COPY
☐	Password manager		○
☐	Recovery codes		○
☐	Email accounts		○
☐	Phone and photo backups		○
☐	Scans of these papers		○
☐	Banking apps		○
☐	Utility accounts		○
☐			○

HOW TO USE

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CHECKED _____ _____ _____

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IMPORTANT
DOCUMENTS CHECKLIST
Where Every Paper Is

IDS AND RECORDS *for each person*

	DOCUMENT	KEPT IN	COPY
☐	Birth certificates		○
☐	Social Security cards		○
☐	Passports		○
☐	Driver's licenses		○
☐	Marriage certificate		○
☐	Citizenship papers		○
☐	Adoption papers		○
☐			○

HOME AND CAR *spare keys count too*

	DOCUMENT	KEPT IN	COPY
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☐	Property tax records		○
☐	Car titles		○
☐	Car registration		○
☐	Warranties and manuals		○
☐	Spare keys		○
☐			○

MONEY *names only, never numbers*

	DOCUMENT	KEPT IN	COPY
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☐	Safe deposit box key		○
☐			○

HEALTH *one list for each person*

	DOCUMENT	KEPT IN	COPY
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☐	Advance directive		○
☐	School health forms		○
☐			○

INSURANCE *know who to call*

	DOCUMENT	KEPT IN	COPY
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☐	Car policy		○
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☐	Claims phone numbers		○
☐	Other policies		○
☐			○

DIGITAL *never write a password here*

	DOCUMENT	KEPT IN	COPY
☐	Password manager		○
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☐	Banking apps		○
☐	Utility accounts		○
☐			○

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WHO ELSE KNOWS

where this page is

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PHONE _____

CHECKED _____ _____ _____

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EVERY BILL, EVERY MONTH, ONE TICK EACH

12-MONTH *Bill Tracker*

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

Nov

Dec

ON AUTOPAY

and the day it comes out

Every bill in one place.

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Important Documents

CHECKLIST

TICK WHAT YOU HAVE, THEN WRITE WHERE EACH SET IS KEPT

1 IDS AND RECORDS

For each person

- [ ] Birth certificates
- [ ] Social Security cards
- [ ] Passports
- [ ] Driver's licenses
- [ ] Marriage certificate
- [ ] Citizenship papers
- [ ] Adoption papers

KEPT IN _____

2 HOME AND CAR

Spare keys count too

- [ ] Deed or lease
- [ ] Mortgage papers
- [ ] Property tax records
- [ ] Car titles
- [ ] Car registration
- [ ] Warranties and manuals
- [ ] Spare keys

KEPT IN _____

3 MONEY

Names only, never numbers

- [ ] Bank and card list
- [ ] Tax returns
- [ ] Recent pay stubs
- [ ] Retirement accounts
- [ ] Loan papers
- [ ] Will or trust
- [ ] Safe deposit box key

KEPT IN _____

4 HEALTH

One list for each person

- [ ] Medication list
- [ ] Vaccination records
- [ ] Allergy list
- [ ] Doctor and dentist list
- [ ] Health care proxy
- [ ] Advance directive
- [ ] School health forms

KEPT IN _____

5 INSURANCE

Know who to call

- [ ] Health insurance cards
- [ ] Dental and vision cards
- [ ] Home or renter's policy
- [ ] Car policy
- [ ] Life insurance policy
- [ ] Claims phone numbers
- [ ] Other policies

KEPT IN _____

6 DIGITAL

Never write a password here

- [ ] Password manager
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KNOW WHERE IT IS
BEFORE YOU NEED IT.

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