

The Family Document Checklist

Know what you have, where it is, and who can find it.

How to use it: tick each document you have, note where it's kept, and who knows where it is.

★ = the signed or certified **original** matters, not just a copy.

1 Identity and vital records

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ Birth certificates, certified copies (each family member)		
☐ Social Security cards		
☐ Passports ★		
☐ Driver's licenses and state IDs (copies)		
☐ Marriage certificate / divorce decree ★		
☐ Adoption papers ★		
☐ Citizenship or naturalization papers, green cards ★		
☐ Military discharge papers (DD-214) ★		

2 Estate and legacy

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ Will (many courts require the signed original for probate) ★		
☐ Trust documents and amendments ★		
☐ Financial power of attorney ★		

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ Healthcare power of attorney / healthcare proxy ★		
☐ Living will / advance directive		
☐ Prenuptial or postnuptial agreement ★		
☐ Guardianship choices for minor children		
☐ Letter of wishes (funeral wishes, personal messages)		
☐ Your attorney's and executor's names and contact details		

3 Property

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ Property deeds ★		
☐ Mortgage documents and payoff records		
☐ Vehicle titles ★		
☐ Leases and rental agreements		
☐ Home improvement receipts (for taxes when you sell)		

4 Money and accounts

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ List of bank and credit union accounts (institution and last 4 digits only)		
☐ Retirement accounts: 401(k), IRA, pension		
☐ Brokerage and investment accounts		
☐ Paper stock certificates and savings bonds ★		
☐ Beneficiary designations for each account (confirm they're current)		
☐ The last 3 years of tax returns		

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ Loans and debts owed, including personal loans to family		

5 Insurance

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ Life insurance policies ★		
☐ Homeowners or renters policy		
☐ Auto, umbrella and long-term care policies		
☐ Health insurance cards (copies)		
☐ Agent names and policy numbers		

6 Health

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ Medication list and allergies, for each person		
☐ Doctors and pharmacies		
☐ Vaccination records		
☐ HIPAA authorization forms, so family can speak to doctors		

7 Valuables and home inventory

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ Photos or video of each room and your valuables		
☐ Appraisals for jewelry, art and collectibles		
☐ Receipts for major purchases		
☐ Serial numbers for electronics and equipment		

8 Digital life

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ A list of important online accounts (never write passwords on this sheet)		

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ Where your password manager recovery details are kept		
☐ Who should handle your email, photos and social media		
☐ Where your crypto wallet recovery details are kept, if any		

9 Business (if you own one)

DOCUMENT	WHERE IT'S KEPT	WHO KNOWS WHERE IT IS
☐ Operating or partnership agreement ★		
☐ Buy-sell agreement ★		
☐ Key contacts: accountant, attorney, partners		

Keep it current

Review this list once a year, and after any big life event: marriage, divorce, a birth, a death, a move, a new home, or a change in who you'd want in charge.

Tell someone

The best-organized documents don't help if no one knows where they are. Share this checklist's location with at least one person you trust.

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