ROOM BY ROOM · PAPERS AND RECORDS

Which Documents to Keep

A list of the documents to gather, grouped by category, so nothing important is missed.

WHERE TO START

Use this list alongside the Important Papers checklist. Check off each document as you find it.

WHAT YOU'LL NEED

- ☐ Your fireproof file box
- ☐ Scanner or a scanning app
- ☐ A flash drive

BEFORE YOU BEGIN

Put the time on your calendar like any other appointment. Give it one unhurried sitting at the kitchen table.

The method

1. **Gather every paper**
   Bring them all to one table: the drawer, the counter, the folder in the car. One pile you can see beats five you can't.
2. **Keep only what you need**
   Shred or recycle duplicates, old statements and anything you can find again online.
3. **Scan what matters**
   Save a copy in the cloud and on a flash drive. A phone scanning app works if you don't have a scanner.
4. **Sort into categories**
   Make a pile for each category before you label a single folder.
5. **File and label**
   One folder per category, labeled clearly enough that someone else could find what they need.
6. **Choose where it lives**
   Somewhere easy to reach, so it gets used and kept up instead of avoided.

Good to know

Permanent papers first

Birth and marriage certificates, passports, wills and powers of attorney.

Then property

Deeds, titles, insurance, leases and an inventory of valuables.

Copy your cards

Scan both sides of every insurance and credit card and save them on the flash drive.

KEEP IT THAT WAY

Update the list each time a document changes, like a renewed passport or a new policy.

ONE THING TO REMEMBER

Download your contacts too. It's the list people most often wish they'd saved.

YOUR CHECKLIST IS ON THE NEXT PAGE

More tips and photos in the full post: read it here

ROOM BY ROOM · PAPERS AND RECORDS · CHECKLIST

Which Documents to Keep

STARTED _____ DONE _____

- [ ] Permanent documents:
  - [ ] Birth certificates
  - [ ] Social Security cards
  - [ ] Passports
  - [ ] Marriage certificate
  - [ ] Prenuptial agreement
  - [ ] Divorce decree
  - [ ] Citizenship or naturalization papers
  - [ ] Military discharge papers
  - [ ] College transcripts
  - [ ] Adoption papers
  - [ ] Will and living will
  - [ ] Power of attorney
- [ ] Money, taxes and property:
  - [ ] Deeds
  - [ ] Insurance policies
  - [ ] Survey plots of properties you own
  - [ ] Rental or lease agreements
  - [ ] Bills of sale
  - [ ] Inventory of collections, art, electronics and valuables
  - [ ] Property taxes
  - [ ] Vehicle titles
- [ ] **Medical:** copies of insurance cards and policies, and a list of your providers.
- [ ] **Credit cards:** copy or scan every card, front and back, and save the scans on a flash drive.
- [ ] **Bills:** keep a copy from every service provider you use. Scan and save them on a flash drive to cut down on paper.
- [ ] **Contacts:** download all your contacts and save them on a flash drive.

NOTES

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