

Family Preparation in the City and Suburbia

Document Tracking System

Fill in the information for each person in the household. Print a copy to safely store.

For _____

Document	Already Have	Date Sent For	Follow-up Date	Date Received	Location
Bank Records					
Baptismal Records					
Birth Certificate					
Court Records ²					
Credit Card Receipts (12 months)					
Credit Report					
Deeds, Proof of Ownership					
Employment Records					
Insurance Policies & Proof of Payment					
Marriage Records					
Medical Records					
Membership Records					
Military Records					
Passport					
Professional & Business Licenses					
Proof of Money Owed to You					
Property Tax Records					
Social Security Records					
Stocks, Bonds & Financial Investments ⁴					
Tax Records (7 years)					
Utilities Bills (12 months) ³					

1. Make one copy of this tracking system for each person in your household
2. Court records will include bankruptcy records, judgements, and trial information.
3. If you haven't begun saving receipts, start now. It is better to have some record of payment than none at all.
4. The best option is to have the actual stock or bond certificate. In lieu of that, obtain a notarized statement from your broker verifying ownership.

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