Where to Keep Financial and Legal Documents

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| --- | --- | --- | --- |
| TYPE OF STORAGE | DOCUMENT(S) | KEEP A COPY? | WHERE TO STORE DUPLICATE |
| Safe Deposit Box | Birth and death certificate; marriage license; adoption; citizenship; divorce papers | Yes | Home file |
|  | Inventory and photos of household property | Yes | Home file |
|  | Deeds, titles, bills of sale, car title, mortgage | Yes | Home file |
|  | List of location of important papers | Yes | Home file, relative, friend or attorney’s office |
|  |
| Home File or Annual Tax File | Tax returns; supporting documents for past 2 to 10 years | No |  |
|  | Passport | No |  |
|  | Bank Accounts | No |  |
|  | Copies of Credit Cards | No |  |
|  | Insurance policies | No |  |
|  | List of all assets, including brokerage and mutual fund accounts, stocks, bonds, bank accounts, real property, and employee benefit accounts | No | Tax Documents |
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| Attorney’s Office | Will, durable power of attorney | Yes | Home file and executor or personal representative |
|  | Funeral instructions | Yes | Friend, relative and home file |
|  | Living will, health care power of attorney | Yes | Home file, physician, personal representative |
|  | Location of safe deposit box | Yes | Joint owner, friend, relative and home file |
|  |
| Wallet | Driver’s license or other photo ID | Yes | Home file |
|  | Auto insurance card | Yes | In car |
|  | Emergency contacts | Yes | Home file |
|  | Blood type, list of allergies, medications | If possible | Home file |

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CRN202708-6659725