



Financial Planning for
 Generation X & Y Women
<http://wiseupwomen.org>

Vital Documents Inventory

Everyone has vital documents. This inventory can help you organize your basic information. Not all components of the inventory will apply to you. Some elements of your financial life may be missing, so be sure to add them. You can complete the inventory fairly easily if you know where your documents are located. Use a pencil, because you are likely to make location changes as you organize yourself. Make sure you keep this information in a safe place “away from prying eyes.”

Vital Documents Inventory	
Name:	Date:
Type of Document	
Emergency and Estate Related	Location
Key Names, Addresses, Phone Numbers	
Letter of Last Instruction	
Wills/Trusts	
Other: could include vital information about parents	

Insurance Related	Location
Auto	
Disability	
Health	
Life	
Long Term Care	
Other:	

Certificates and Deeds	Location
Automobile Titles	
Birth Certificates	
Death Certificates	
Divorce Decrees	
Marriage Certificates	
Military Service and Discharge Documents	
Passports	
Real Estate Deeds	
Other:	

Investments and Savings (non-retirement)	Location
Certificates of Deposit	
Mutual Fund Records	
Savings Passbooks or Statements	
Stock Certificates	
Other: could include brokerage account records and real estate investment records	

Retirement Accounts	Location
IRA Account Records	
Roth IRA Account Records	
Retirement Account Records (401[k], 403[b], etc.)	
Other: include all retirement accounts	

Checking Accounts	Location
Primary Checking Account Records	
Secondary Checking Account Records	
Other: locations may be paper or electronic or on-line	

Loans and Credit Cards	Location
Credit Card Safety Record	
Loans and Mortgages Outstanding	
Other:	

Tax Records	Location
Last Year's Tax Return	
Past Tax Returns (last seven years)	
Other: Could include permanent records for home improvements that affect real estate basis/value	

Other Records	Location
List of my websites, account numbers, and PINs	

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<http://wiseupwomen.tamu.edu/downloads/worksheets-pdf/My-Vital-Documents-Inventory.pdf>



Women's Bureau
U.S. Department of Labor
www.dol.gov/wb

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