

Location of Important Documents

Estate Documents

Original Documents	Suggested time to retain	Suggested location of these documents	Actual location of original documents
Last will and testament	Indefinitely	Attorney and safe-deposit box	
Living will/health care proxy	Indefinitely	Home	
Durable power of attorney	Indefinitely	Home	
Revocable trust agreement	Indefinitely	Trustee and safe-deposit box	
Trustee information	Indefinitely	Trustee and safe-deposit box	
Charitable trust agreement	Indefinitely	Trustee and safe-deposit box	
Charitable donation preferences	Indefinitely	Trustee and safe-deposit box	
Burial instructions	Indefinitely	Home and a copy in this binder	
Cemetery plot deed	Indefinitely	Home and a copy in this binder	
Prepaid cremation papers	Indefinitely	Home and a copy in this binder	

Estate Documents (continued)

Funeral home preference and information	Indefinitely	Home and a copy in this binder	
Letter of instruction to executor	Indefinitely	Home	
Death certificate(s) of pre-deceased loved ones	Indefinitely	Safe-deposit box	

Personal

Original documents and information	Suggested time to retain	Suggested location of these documents	Actual location of original documents
Social Security card	Indefinitely	Home	
Birth Certificates	Indefinitely	Safe-deposit box	
Passport/citizenship (naturalization) papers	Indefinitely	Safe-deposit box	
Adoption papers	Indefinitely	Safe-deposit box	
Marriage certificate	Indefinitely	Safe-deposit box	
Prenuptial agreement	Indefinitely	Safe-deposit box	
Divorce or separation papers	Indefinitely	Safe-deposit box	

Personal (continued)

Military service records	Indefinitely	Safe-deposit box	
Safe-deposit box key	Indefinitely	Home	

Ownership

Original documents and information	Suggested time to retain	Suggested location of these documents	Actual location of original documents
Real estate deeds	Until transfer of property	Safe-deposit box	
Home purchase and home improvement records	As long as you own the home	Home and safe-deposit box	
Vehicle titles	Until sale or discard of vehicle	Safe deposit box	
Other titles of ownership	Until sale or discard of items	Safe-deposit box	
Appraisal and inventory of valuable items	Keep current	Safe-deposit box	
Household inventory	Keep current	Safe-deposit box	
Receipts for major purchases	Until sale or discard of item	Home	
Service contracts and warranties	Until expiration	Home	

Ownership (continued)

Original documents and information	Suggested time to retain	Suggested location of these documents	Actual location of original documents
Stock and/or bond certificates	Until cashed in or sold	Safe-deposit box	
Investment purchase and sale records (trade confirmations)	Six years after tax-filing deadline in the year after sale*	Home	

Tax

Original documents and information	Suggested time to retain*	Suggested location of these documents	Actual location of original documents
Prior years' federal and state tax returns	Six years from filing date	Home	
Federal and state gift tax returns	Six years from filing date	Home	
Property and school tax records	Six years from filing date	Home	

* Please consult a qualified tax professional regarding the length of time you should retain your tax records