

FE446 (Revised March 2020)

Inventory of Important Papers



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An inventory of important papers will help you find records when you need them, and it can be a guide to others in an emergency.

Keeping family records in an organized manner saves time, trouble, money and frustration.

This publication was authored by Debra Pankow, former family economics specialist, NDSU, 2006.

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This inventory may be filled out by hand or in a fillable-form file found online at www.ag.ndsu.edu/pubs/yflfamgmt/fe446.pdf and updated as needed.

Keep one copy of this inventory in a convenient spot in your home files, and a photocopy in your safe deposit box or a fireproof, waterproof and burglarproof home safe. You can store the computer file version on a computer hard drive or in a secure online storage system.

Properly filled out and kept current, this information can help you find records when you need them

A good recordkeeping system, with an up-to-date inventory, will allow someone who is unfamiliar with the system to locate important documents, maintain records and prepare reports in case of an emergency.

For more information on important family records see the following NDSU Extension publications:

- FE445 – Family Records: What to Keep, Where and for How Long
- FE1748 – Replacing Important Papers.

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Family Record

Family Member Name	Birth Date	Location of Birth Certificate*	Social Security Number	Location of Social Security card*

* Because of the threat of identity theft, carry your Social Security card only when needed for employment and to register for benefits. Keep your Social Security card number and birth certificates in a safe-deposit box at a financial institution or in a fireproof, waterproof and burglarproof home safe.

Important Advisers and Contacts

Type	Name	Address	Telephone or Email Address
Attorney			
Executor/trix of my will			
Executor/trix of will for spouse/partner			
Religious adviser			
Primary-care doctor			
Other doctors			
Dentist			
Accountant or tax adviser			
Stockbroker/investment adviser			
Banker or trust officer(s)			
Employer or personnel manager			
Business manager or business partner			
Life insurance agent			
Home insurance agent			
Auto insurance agent			
Child/adultcare provider			
Neighbor or close friend			
Parents – maternal			
Parents – paternal			
Guardian of children			
Children's school contacts			

Property

Type	Owner(s)	Type of Ownership	Date Acquired	Location/Description	Location of Title/ Ownership Information*	Additional Information
Real estate: Residence(s)						
Business(es)						
Timeshare(s)						
Cemetery plot(s)						
Motor vehicle(s)						
Other						

* Store titles, leases and other important ownership information in a safe-deposit box or fireproof, waterproof and burglarproof home safe.

Banking, Savings and Investments

Type	Financial Institution/Company	Address/Telephone	Owner	Location of Records*	Additional Information (if applicable)			
					I.D. #	Beneficiary	Price/Value(s)	Dates (purchase, maturity, etc.)
Checking account(s)								
Savings account(s)								
Money market account(s)								
Bonds, treasury bills, etc.								
Stocks, mutual funds, investment trusts, etc.								
Individual Retirement Accounts, Keogh accounts, SEPs								
Retirement plans, pensions, etc.								
Other								

* Savings and investment certificates, bonds, bills and other evidence of ownership (financial records difficult or costly to replace, or that could be transferred illegally in case of loss or theft) should be kept in a safe-deposit box or fireproof, waterproof and burglarproof home safe. Monthly statements and substitute or canceled checks, or their images, which generally can be replaced, can be kept in a home business center, file drawer, desk, etc.

Insurance (Life, Health, Disability, Homeowner's/Renter's, Auto, etc.)

Type	Company and Address	Policy #	Location of Policy	Additional information (if applicable)				Value(s)
				Primary Beneficiary	Contingent Beneficiary	Policy Owner	Person/Property Insured	

Debt Information

Type	Company/Person and Address	Total \$\$ Owed	Payment Amount and Date	Location of Contracts/Records*	Additional Information
What we owe:					
What others owe us:					

* Keep important contracts, notes, liens and evidence of debt payments in a safe-deposit box or fireproof, waterproof and burglarproof home safe.

Membership in Organizations/Clubs*

Name of Organization/Club	Address	Telephone	Membership Information	
			In Whose Name	Number

* Carry membership cards used on a regular basis in your purse or wallet.

Other Important Records

	Kind of paper or record	Location	Additional Information	
Safe-deposit box	Adoption papers			
	Baptismal records			
	Titles and bills of sale			
	Citizenship/naturalization papers			
	Death certificates			
	Diplomas			
	Divorce/separation papers			
	Durable powers of attorney			
	Easements/rights of way			
	Health records (with blood type)			
	Household inventory			
	Irreplaceable receipts (proof of tax deductions)			
	Living will			
	Marriage certificates			
	Military records			
	Passport			
	Patents/copyrights			
	Trust			
	Will			
	Home business center	Appraisals: collections/antiques/jewelry/other		
Cemetery plot/records				
Computer passwords (copy)				
Education records				
Employment records				
Family history				
Household inventory (copy)				
Income/expense records				
Income tax returns				
Funeral plan documents/instructions				
Legal appointments for others (e.g., power of attorney, executor/trix of will)				
Letter of last instructions				
Living will (copy)				
Medical records				
Net worth statements				
Safe-deposit box inventory				
Warranties/appliance manuals				
Will (copy)				
Wallet		Employee ID card		
		Identity card/whom to notify		
	Insurance/medical cards			
	Organ donor card			
Other	Living will (copy at doctor's office)			

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For more information on this and other topics, see www.ag.ndsu.edu

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