**Record Organization**

**for Your Home**

Organize a notebook or electronic file of essential information. Here’s a list that will be beneficial in your estate planning.

* Inventory of essential documents i.e., birth certificate, passport, titles, deeds, will trust, marriage license, Social Security card, death certificate, prenuptial agreements, divorce certificate, etc. Record the safe storage location of these documents.
* List of income sources
* Banking information
* Savings/Investments
* Housing
* Insurance (house, car, life, medical)
* Utilities
* Transportation
* Debts
* Home Services
* Entertainment
* Medications
* Online businesses (Amazon, PayPal, eBay, etc.)
* Pets
* Budget

I found the following resource after creating my home records. You may want to review it for additional items to consider. [www.everplans.com](http://www.everplans.com) Checklist: Documents to Organize and Share