

## Categories

GOVERNMENT	RECORD	Date Completed	NOTES
	Social Security		
	Drivers License/State ID		
	Car Registration		
	Car Title		
	Passport		
	Professional License		
	Voter Registration		
	US Postal Service		
	IRS		
	State Tax Department		
Bank Records	RECORD	Date Completed	NOTES
	Checking		
	savings		
	CD		
	Money Market		
	Trust Accounts		
	Bank Cards		
Credit/Charge Cards	RECORD	Date Completed	NOTES
	Visa		
	MasterCard		
	American Express		
	Capital One		
	Discover		
Loans	RECORD	Date Completed	NOTES
	Auto Loans		
	Student Loans/Grants		
	Mortgage		
	Personal Loans		
Employment	RECORD	Date Completed	NOTES
	Payroll		
	Benefits Administrator		
	Pension Administrator		
	ID Card		
	unions		
	licenses		
	professional website		
	business cards		

Housing	RECORD	Date Completed	NOTES
	Landlord Homeowners Association Tenants Association Management Company Deed		
Insurance	RECORD	Date Completed	NOTES
	Auto Insurance Homeowner's/Renter's Insurance Medical Insurance Dental insurance unemployment/disability vision insurance		
Doctors/medical records	RECORD	Date Completed	NOTES
	Primary care Dental vision surgeon therapist ob/gyn pharmacist		
Investments	RECORD	Date Completed	NOTES
	IRA 401K pension (beneficiaries) brokerage trusts		
Businesses	RECORD	Date Completed	NOTES
	health club supermarket club card Web businesses (groupon, ebay, etc) iTunes Amazon frequently used websites frequent flyer programs		
Utilities	RECORD	Date Completed	NOTES
	Cell phone		

Internet provider  
landline  
TV  
Electricity  
Water  
gas

Subscriptions                      RECORD                      Date Completed                      NOTES

Magazine  
Newspaper

School (other than loans) RECORD                      Date Completed                      NOTES

Student Records  
Diploma  
School ID  
transcripts

Other people/parents              RECORD                      Date Completed                      NOTES

(anyone who lists YOU  
in their legal docs)              wills  
trusts  
insurance

Misc.                                      RECORD                      Date Completed                      NOTES

Email (work, school, personal)  
Facebook  
Social Media  
library card

Legal                                      RECORD                      Date Completed                      NOTES

Trust  
Health proxy  
will

Professionals                          RECORD                      Date Completed                      NOTES

Accountant  
Attorney  
Investment Advisor  
Vet/Pet caretakers