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Important Documents

Use this form to show where the following important documents are stored.

Category	Document Type	Document Location
ASSETS	Certificates of deposit	
	Savings bonds	
	Stock & bond certificates	
	Checkbooks	
	Vehicle titles	
	Appraisals (jewelry, etc)	
MONTHLY FINANCES	Homeowners Assn bills	
	Heating, electric, & water	
	Trash, pest control, etc	
	Lawn, snow removal, etc	
	Phone, cable, internet, etc	
	Insurance bills	
INSURANCE POLICIES	Home insurance policies	
	Automobile insurance	
	Life insurance policies	
	Health insurance policies	
	Mortgage insurance	
HOME & REAL ESTATE	Real estate titles	
	Mortgage & loan papers	
	Household warranties	
BUSINESS RECORDS	Business legal documents	
	Other business records	
LEGAL RECORDS	Birth certificate	
	Will	
	Trusts	
	Social Security card	
	Military discharge papers	
	Citizenship / passport	
	Marriage license	
	Divorce papers	
	Income tax returns	
	Property & other taxes	
OTHER DOCUMENTS		