

# Money Date

## Organize Your Important Records

Organizing your records will help you improve your financial life. Having your records in a secure place and at reach will make it easy to access documents when needed.

### Legal identification documents



- Social Security cards
- Birth certificates
- Adoption papers
- Marriage licenses
- Passports

### Finance records



- Pay stubs
- Canceled checks
- Disability or unemployment records
- Retirement/pension plan records
- Investment statements

### Medical records



- Wills, powers of attorney/living will
- Medical bills
- Burial instructions
- Health insurance policies

### Property records



- Tax returns
- W-2s and 1099 forms
- Any tax-related forms, receipts and records

### Tax documents



- Vehicle registration and titles
- Mortgage statements, deeds and bills of sale
- Insurance policies (home, auto, personal property, etc.)

You don't need anything fancy to store your important documents, an accordion folder will do. Make sure it is in a easy to access, safe, water proof, and fire proof area.