

Important papers

Tick copies gathered. Use a dash where an item does not apply.
Paper = hard copy | Digital = saved copy | By = name or initials

Prepared for: _____

No.	Document	Pgs	Paper	Digital	By	Date
Identification						
1	ID book or card	___	☐	☐	_____	_____
2	Birth certificate	___	☐	☐	_____	_____
3	Adoption papers	___	☐	☐	_____	_____
4	Family death certificates	___	☐	☐	_____	_____
5	Passports, green cards and visas	___	☐	☐	_____	_____
6	Naturalisation or dual citizenship documents	___	☐	☐	_____	_____
7	Marriage certificates and divorce papers	___	☐	☐	_____	_____
8	Driver’s licence	___	☐	☐	_____	_____
9	Military or work ID	___	☐	☐	_____	_____
10	Social security cards or SASSA records	___	☐	☐	_____	_____
11	Church or baptismal records	___	☐	☐	_____	_____

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Estate planning						
12	Will	___	☐	☐	___	___
13	Living will	___	☐	☐	___	___
14	Power of attorney and advance healthcare directive	___	☐	☐	___	___
15	Medical and burial instructions	___	☐	☐	___	___
16	Care of dependants	___	☐	☐	___	___
17	Beneficiary directions	___	☐	☐	___	___
Business						
32	Business registration papers	___	☐	☐	___	___
33	Business account details	___	☐	☐	___	___
34	Business assets and liabilities statement	___	☐	☐	___	___
35	Ownership, active responsibilities and procedure on death	___	☐	☐	___	___
36	Shares and joint ownerships	___	☐	☐	___	___

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Finance

18	Retirement accounts	___	☐	☐	___	___
19	Pension plan	___	☐	☐	___	___
20	Stocks, bonds and mutual fund investments	___	☐	☐	___	___
21	Savings	___	☐	☐	___	___
22	Rewards programmes	___	☐	☐	___	___
23	Bank statements and account information	___	☐	☐	___	___
24	Credit and debit card documentation	___	☐	☐	___	___
25	Payslips	___	☐	☐	___	___
26	Unemployment benefits	___	☐	☐	___	___
27	Government benefits and assistance	___	☐	☐	___	___
28	Maintenance, child support or elder care owed or owing	___	☐	☐	___	___
29	Study loans	___	☐	☐	___	___
30	Life insurance	___	☐	☐	___	___
31	Medical aid	___	☐	☐	___	___

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Taxes						
37	Personal tax documents and returns	____	☐	☐	_____	_____
38	Business tax documents and returns	____	☐	☐	_____	_____
39	VAT registration and returns	____	☐	☐	_____	_____
40	Vehicle tax documents	____	☐	☐	_____	_____
41	Property tax documents	____	☐	☐	_____	_____

Property and home						
42	Title deed and sale documents	____	☐	☐	_____	_____
43	Mortgage contract, statements and body corporate rules	____	☐	☐	_____	_____
44	Rental agreement, addenda, deposit records, inspections and invoices	____	☐	☐	_____	_____
45	Utility billing details and quarterly statements	____	☐	☐	_____	_____
46	Home improvement receipts	____	☐	☐	_____	_____
47	Major purchase receipts	____	☐	☐	_____	_____
48	Home inventory	____	☐	☐	_____	_____

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Vehicles						
49	Ownership and registration papers	____	☐	☐	_____	_____
50	Vehicle finance arrangements	____	☐	☐	_____	_____
51	Maintenance receipts	____	☐	☐	_____	_____
52	Insurance	____	☐	☐	_____	_____
Health						
53	Medical and dental records	____	☐	☐	_____	_____
54	Medical aid contract	____	☐	☐	_____	_____
55	Organ donor card	____	☐	☐	_____	_____
56	Immunisation records	____	☐	☐	_____	_____
57	Billing and claims records	____	☐	☐	_____	_____
58	Receipts	____	☐	☐	_____	_____
Pets						
59	Veterinarian contact details and records	____	☐	☐	_____	_____
60	Immunisation records	____	☐	☐	_____	_____
61	Microchip records	____	☐	☐	_____	_____
62	Special needs or dietary requirements	____	☐	☐	_____	_____

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Education and employment

63	Degrees and diplomas	____	☐	☐	_____	_____
64	Partial or short-course credits	____	☐	☐	_____	_____
65	Academic records	____	☐	☐	_____	_____
66	Employment and service-provider contracts	____	☐	☐	_____	_____
67	Licences	____	☐	☐	_____	_____
68	Military discharge or end-of-employment papers	____	☐	☐	_____	_____

Other records

69	Police clearance and criminal records	____	☐	☐	_____	_____
70	Firearm licences	____	☐	☐	_____	_____
71	Safe deposit information	____	☐	☐	_____	_____
72	Storage facility information	____	☐	☐	_____	_____

Online and memberships

73	Social media accounts and secure access instructions	____	☐	☐	_____	_____
74	Club memberships	____	☐	☐	_____	_____
75	Apps, noticeboards and special interest groups	____	☐	☐	_____	_____

For digital access, record where secure instructions are kept.
Avoid writing passwords on a checklist you may share.

Storage locations / notes