



**Critical Household Documents to Organize**  
(Recommended to add to your ShareFile Account)

**I. Essential Documents**

1. Will
2. Living Will
3. Letter of Instruction
4. Trust Documents

**II. Bank Accounts**

1. List of ALL Bank Accounts
2. List of all User Names & Passwords
3. List of Safe Deposit Boxes

**III. Life Insurance & Retirement**

1. Life Insurance Policies
2. Individual Retirement Accounts
3. 401(k) Accounts
4. Pension Documents
5. Annuity Contracts

**IV. Health-Care**

1. Do-not-Resuscitate Order
2. Durable Healthcare Power of Attorney
3. Authorization to release Healthcare Information

**V. Proof of Ownership**

1. Tax Returns
2. Housing, Land and Cemetery Deeds
3. Escrow Mortgage Accounts
4. Vehicle Titles
5. Stock Certificates & Savings Bonds
6. Partnership & Corporate Operating Agreements

**VI. Marriage & Divorce**

1. Marriage License
2. Divorce Papers