

Categories to Organize

- Personal Documents** (Birth Cert., Marriage License, Agreements, etc.)
- Financial Records** (Pension, IRA, 401K, Bank Records, etc.)
- Personal Items** (Clothing, Books, Memorabilia, Clutter, etc.)
- Electronic Documents** (Passwords, Files, Cloud Documents, etc.)
- Assets** (Mortgage, Vehicle Records, Household Furnishings, etc.)
- Legacy Information** (Living Trust, Last Will, Life Story, etc.)
- Garage Items**
- Other:** _____

Item to Organize

What I'd Like Done With This... (Check all applicable boxes)

- Organize
- Label
- Document / catalog for future reference
- Appraise value: _____
- Bequeath or give away
- Donate to: _____
- Give away to: _____
- Bequeath to: _____
- Tax deductible receipt?
- Document donation for taxes?
- Storage: _____
- Storage: Fireproof / Safe
- Destroy
- Discard / recycle

Describe How You Will Organize This

Completion

Date Completed: _____ Completed By: _____

Location of Storage _____ Name of Person(s) Notified (Optional) _____

Location of Documentation _____ _____