

Categories			
<u>GOVERNMENT</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Social Security		
	Drivers License/State ID		
	Car Registration		
	Car Title		
	Passport		
	Professional License		
	Voter Registration		
	US Postal Service		
	IRS		
	State Tax Department		
<u>Bank Records</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Checking		
	savings		
	CD		
	Money Market		
	Trust Accounts		
	Bank Cards		
<u>Credit/Charge Cards</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Visa		
	MasterCard		
	American Express		
	Capital One		
	Discover		
<u>Loans</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Auto Loans		
	Student Loans/Grants		
	Mortgage		
	Personal Loans		
<u>Employment</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Payroll		
	Benefits Administrator		
	Pension Administrator		
	ID Card		
	unions		
	licenses		
	professional website		
	business cards		
<u>Housing</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Landlord		
	Homeowners Association		
	Tenants Association		
	Management Company		
<u>Insurance</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Auto Insurance		
	Homeowner's/Renter's Insurance		
	Medical Insurance		
	Dental insurance		
	unemployment/disability		
	vision insurance		
<u>Doctors/medical records</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>

	Primary care		
	Dental		
	vision		
	surgeon		
	therapist		
	ob/gyn		
	pharmacist		
<u>Investments</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	IRA		
	401K		
	pension (beneficiaries)		
	brokerage		
	trusts		
<u>Businesses</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	health club		
	supermarket club card		
	Web businesses (groupon, ebay, etc)		
	iTunes		
	Amazon		
	frequently used websites		
	frequent flyer programs		
<u>Utilities</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Cell phone		
	Internet provider		
	landline		
	TV		
	Electricity		
	Water		
	gas		
<u>Subscriptions</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Magazine		
	Newspaper		
<u>School (other than loans)</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Student Records		
	School ID		
	transcripts		
<u>Other people/parents</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
(anyone who lists YOU in their legal docs)	wills		
	trusts		
	insurance		
<u>Misc.</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Email (work, school, personal)		
	Facebook		
	Social Media		
	library card		
<u>Legal</u>	<u>RECORD</u>	<u>Date Completed</u>	<u>NOTES</u>
	Health proxy		

	will		
Professionals	RECORD	Date Completed	NOTES
	Accountant		
	Attorney		
	Investment Advisor		
	Vet/Pet caretakers		