

VITAL DOCUMENTS MAP

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Guide to the map

A Vital Documents Map is an index of all your most important records so that you have a good handle on what you own. A Vital Documents Map is also a handy guide that can help you reconstruct this information easily in the event of emergency—if you lose your wallet; if your records are destroyed in a fire or natural disaster; if something happens to you and your family needs to know where everything is kept.

Your Vital Documents Map consists of the following:

- Photocopy each important piece of identification in your wallet.
- List of Bank Accounts, Investments & Insurance Policies
- List of Credit Card Accounts and Numbers
- Safe Deposit Box Inventory

Store a copy of your index in 3 places:

- 1) Your home or office filing system in a folder entitled “VITAL DOCUMENTS MAP”;
- 2) Give a copy to your attorney, a friend or a family member who doesn’t live with you;
- 3) Place a copy in your safe deposit box.



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BANK ACCOUNTS

Account Holder e.s. John Smith	Type of Account e.s. Checking	Institution e.g. Citibank	Account # e.g. 12-345678-91	Contact & Phone Number e.g. Brian Boswell 421-567-8912



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INVESTMENT ACCOUNTS

Account Holder e.g. John Smith	Type of Account e.g. Pension	Institution e.g. Merrill Lynch	Account # e.g. 12345-678912	Contact & Phone Number e.g. Lynn Sample 1-800-456-7321



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INSURANCE POLICIES

Policy Holder e.g. John Smith	Type of Account e.g. Auto Insurance	Institution e.g. Allstate	Account # e.g. 789-456-321	Contact & Phone Number e.g Bill Young 431-567-3456



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CREDIT CARD ACCOUNTS

Account Holder e.s. Mary Smith	Type of Account e.s. Visa	Institution e.s. Capitol One	Account # e.s. 1234-567-8912	Contact & Phone Number e.s. Customer Svce 800-123-4567



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LOCATION LIST OF DOCUMENTS

Indicate where each of the following records are stored. For items that you keep in safe deposit box, you may want to keep copy in your household files.

DOCUMENT	LOCATION Original	LOCATION Copy	HOW LONG TO KEEP
Automobile Records (titles, registration, repairs)			For as long as you own vehicle(s). If you sell car, keep record of sale permanently (in case new owner accumulates tickets or has accident—to prove innocence)
Appointment Books (past)			1-10 years, depending on if used for tax records, reference or memorabilia
Bank Statements & ATM Slips			Standard is 6 years for tax purposes
Bank Account (opening statements)			As long as you own account
Credit Card Statements			Standard is 6 years if tax-related purchases on statements; otherwise until annual interest statement is issued by company
Credit Report			As long as current
Dividend payment records			Until annual statement is supplied by company, then just annual statements
Family historical information and negatives of important photos			permanently



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LOCATION LIST OF DOCUMENTS (continued)

Household inventory & appraisals (include negatives of pictures and/or videotapes)			As long as current
Insurance Policies (auto, homeowners, liability)			As long as statute of limitations in the event of late claims
Insurance Policies (disability, medical, life, personal property, umbrella)			As long as you own-keep only current policy in effect. When new policy is issued, toss expired one.
Investments (purchase records)			As long as you own, and 6 years subsequent to disposition. Store with tax records.
Investments (sales records)			Standard 6 years for tax purposes
Lease and loan agreements, loan payment books			As long as under term. Keep satisfaction records permanently (to protect credit rating, etc)
Medical Records			Permanently
Military Records			Permanently
Mortgage or loan discharge			Permanently



LOCATION LIST OF DOCUMENTS (continued)

Receipts (Appliances, art, antiques, collectibles, home improvements, household repairs, major purchases)			As long as you own items, and 6 years subsequent to disposition.
Receipts (Clothing, Food)			Until verified against monthly bank or credit card statement. Then toss.
Resume			As long as current
Tax Records (bank statements and cancelled checks, deposit slips, contracts, charitable contributions, credit card statements, income tax returns, medical bills, pension plan records, pay stubs)			Current year, plus six prior years
Vital Documents (Adoption Papers, Birth Certificates, Citizenship papers, Marriage certificate, Death certificate, Divorce decrees, Passports, Patents and copyrights, Stock and bond certificates)			Permanently
Will			As long as current



SAFE DEPOSIT BOX INVENTORY

Store items that would be very difficult to replace in a safe deposit box.

PAPERS

- ☐ Adoption Papers
- ☐ Automobile Title of ownership
- ☐ Birth certificates
- ☐ Citizenship papers
- ☐ Contracts _____
- ☐ Death certificates
- ☐ Deeds & mortgage papers
- ☐ Divorce decrees
- ☐ Household inventory & appraisals (*include Inventory photo negatives and/or videotapes*)
- ☐ Investment certificates
- ☐ Insurance Policies
- ☐ Leases
- ☐ Life insurance policies
- ☐ Marriage certificate
- ☐ Military records
- ☐ Passports
- ☐ Patents and copyrights
- ☐ Retirement plan information
- ☐ Stock and bond certificates
- ☐ Vital Documents Map (Copy)
- ☐ Will (Copy-keep original with Lawyer)
- ☐ Other _____



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SAFE DEPOSIT BOX INVENTORY

☒ OBJECTS

Jewelry

_____	_____
_____	_____
_____	_____
_____	_____

Money

_____	_____
_____	_____

US Savings Bonds

Serial #	Value	Maturity
_____	_____	_____

Treasures

_____	_____
_____	_____
_____	_____

Family History

☐ Family Tree ☐ Negatives of important photos ☐ Videos ☐ Heirlooms

_____	_____
_____	_____



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IMPORTANT NUMBERS

Social Security Numbers:

_____	_____
_____	_____
_____	_____
_____	_____

Contact Numbers:

Lawyer_____	_____
Accountant_____	_____
Physician _____	_____
Dentist _____	_____
Pediatrician _____	_____
Optometrist _____	_____
Gynecologist _____	_____

Frequent Flyer Numbers:

Airline_____	_____
Airline_____	_____
Airline_____	_____
Other_____	_____
Other_____	_____



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IMPORTANT NUMBERS

Passwords:

Computer Log On_____ Alarm System_____

Email_____ ATM Cards_____

Safe:

Location: _____ Combination: _____

Employer Info:

Name of Employer_____

Payroll Department Phone # _____

HR Department Phone # _____

Benefits Department Phone # _____

Life Insurance Acct#_____

Medical Acct#_____

Rx Acct#_____

Dental Acct#_____

Vision Acct#_____

401K Acct#_____

Stock Purchase Acct#_____

Flexible Spending Acct#_____

Carrier_____

Carrier_____

Carrier_____

Carrier_____

Carrier_____

Carrier_____

Carrier_____

Carrier_____



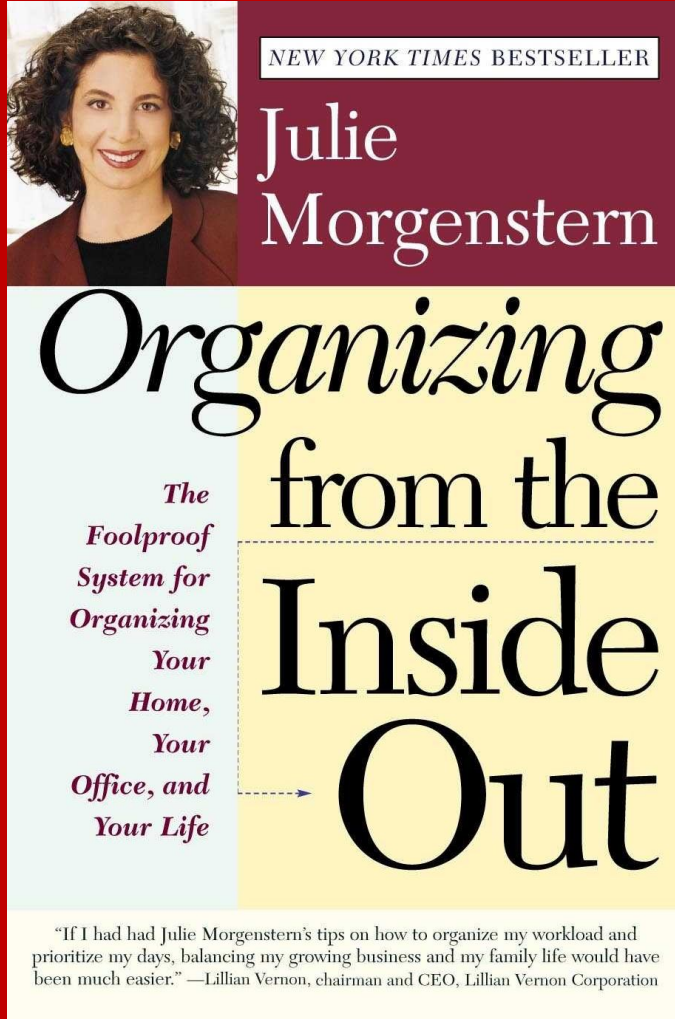
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WALLET CONTENTS

Once per year, photocopy the contents of your wallet (front and back) and clip to this last page. Lay as many cards as will fit on the screen, copy, then turn cards over and photocopy reverse side.



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The content of this workbook has
been adapted from
Organizing from the Inside Out
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Organizing from the Inside Out
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