

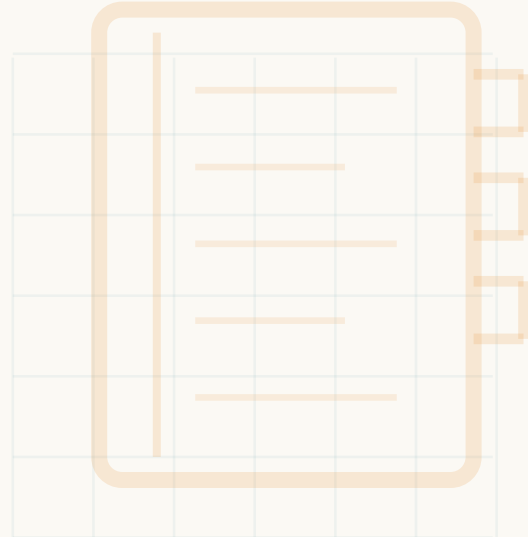


AN ARDENT WORKSHOP PRODUCT

What Documents Do I Need?

A free, self-scoring list of what to locate — before you organize it.

Free · from Ardent Workshop



What documents do I need?

Before you can organize everything that matters, you have to find it. This free checklist is the finding part: a self-scoring list of the documents, accounts, and details a household should be able to locate. Tick what you can already put your hands on; the rest is your to-do list.

RECORD WHERE THINGS LIVE — NOT THE KEYS

As you locate each item, note where it is and who to call — never a password, PIN, or full account number. The goal is a map, not a vault.

Identity & vital records

- Birth certificate (and where the certified original is)
- Passport and any residency documents
- Social Security / national ID — its location, not the number on a loose page
- Marriage certificate; divorce decree if applicable

Money & accounts

- Bank accounts — checking and savings
- Credit and charge cards
- Loans and mortgage (servicer and reference)
- Investment and retirement accounts (401(k), IRA, pension)
- Your password manager — and who has emergency access to it

Insurance

- Life insurance (and the named beneficiaries)
- Health insurance (where the cards are)
- Home / renters and auto insurance

Legal & estate

- Will — the signed original, and where it's kept
- Financial power of attorney
- Advance directive / living will / healthcare proxy
- Beneficiary designations (these often override a will)

Medical

- Doctors and pharmacy
- Current medications, doses, and allergies

Digital life

- Primary email account (the hub that resets everything else)
- Phone and computer — where the recovery info lives, not the PIN on a page

Household & people

- Utility accounts and providers
- Home shut-offs — water, gas, and the electrical panel
- Key people: executor, attorney, and a neighbor with a key

FOUND IT? NOW PUT IT SOMEWHERE.

This checklist tells you what to locate. The Estate / Life-Admin Binder is where it all gets organized and kept current — a 9-tab workbook (Excel & Google Sheets) plus four guides: a document index, accounts and where they live (no passwords), insurance, contacts, medical notes, final wishes, and household reference. [Get it at ardentworkshop.com](https://www.ardentworkshop.com) >

A record-organizing checklist, not legal, medical, financial, or tax advice, and not a will or directive. Record where things live, never passwords or full account numbers. © Ardent Workshop LLC. Free to use; please don't resell or redistribute.