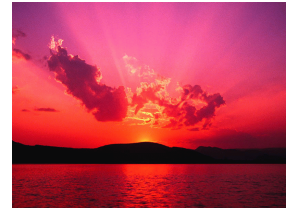


Joe Johnson  
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 8809 Super-Duper Blvd., Big City, KY 43021  
 Phone 111-734-8724



**Clients**  
**Important Documents List ( )**

**Use this document to check for important papers. Put them together in a safe place in your home. Be sure a trusted friend or family member knows where these papers are kept in case of an emergency.**

*Words in italics tell how long each item should be kept or contain a special note about the item.*

**Insurance:**    *Keep the original policies; keep one year of bill statements.*

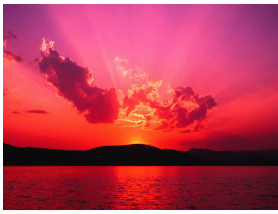
- Health Insurance policies
- Life Insurance policies
- Auto Insurance policies
- Home Owners (renters)
- Medical bills ..... *if claimed on taxes, keep with tax records for 7 years; otherwise, keep for 5 years after you are no longer being treated for the symptoms.*

**Legal:**            *Keep all of the following permanently*

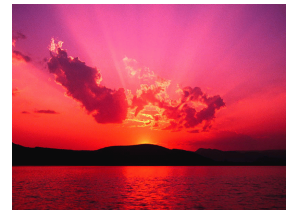
- Will
- Living Will
- Durable power of attorney form
- Birth certificate (certified copy)
- Burial plot and other funeral arrangements
- Immigration/naturalization papers
- Marriage/divorce papers
- Military papers
- Auto titles ..... *Exceptions: Keep all titles and deeds for 1 year after sale; if you donate something to charity, keep that title/deed with tax return for 7 years*
- Deeds or titles

**Financial:**    *Keep annual summaries; shred all other information after 1 year; anything related to taxes should be kept with your tax return for 7 years*

- List of bank account numbers
- List of credit card numbers
- Social Security information - Annual summaries go with taxes
- Mutual funds - Keep any notice of sale for mutual funds/bonds/etc for 7 years after sale
- Bonds/Stock certificates
- Certificates of deposit
- IRAs
- Retirement/savings plan statements
- Pension Information
- Mortgage Papers
- Tax Records
- Broker's Name/phone Numbers - Update as needed
- Safe deposit box location/key/combination - be sure someone you trust has this information



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**Clients**  
**Important Documents List ( )**

**Important Information to Share**

Protect your family with this vital information list. Ensure each field has the appropriate value(s) and keep a copy in a safe place. Be sure someone you trust knows the location of this document in case of an emergency.

**Full Name:** Jenkins, Alvin V

**Address:** 607 Russel Street  
 Apartment 172

**City:** Covington      **State:** Kentucky      **Zip** 41011-      **Country:** United States      **County:** Kenton

**SSN:** 111-75-6692      **Medicare Number:** MED-128123      **Medicaid Number:** CAID-17834

**Marriage/Divorce Location:** Safe Deposit Box  
**SSN Information Location:** Fireproof Vault in Basement

<b>Primary Care Doctor:</b> Dr. Stacy Howard	<b>Phone:</b> 111-374-6555
<b>Lawyer:</b> Gloria Stevenson	<b>Phone:</b> 111-746-5099
<b>Accountant:</b> Steven Jenkins	<b>Phone:</b> 111-095-7438

**Birth Date and Birth Location Information**

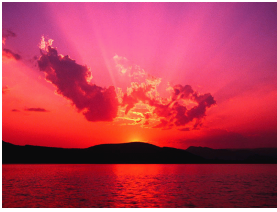
**Date:** 04/21/1946      **Birth Certificate Location:** Harding  
**City:** Harding      **State:** Pennsylvania      **Zip:** 48475-      **Country:** United States      **County:** Wilcox

**Employment/Retirement Information**

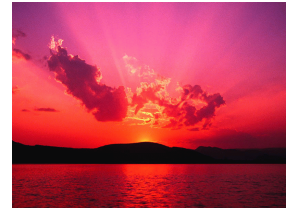
**Employer:** US Steel  
**Address:** 101 Stainless Steel Blvd  
**Contact:** Conrad Bumpkin      **Phone:** 111-384-8575

**Veterans Only**

**War:** Korean Conflict  
**Branch of Service:** Army  
**Serial #** 2452345  
**Place of Induction:** Fort Bragg, GA      **Induction Date:** 07/08/1967  
**Place of Discharge:** Williamstown Military Station, Hackensack, NJ      **Discharge Date:** 05/18/1969  
**Rank at Discharge:** E4  
**Location of DD214:** Hackensack County Court House



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**Clients**  
**Important Documents List ( )**

**INSURANCE**    **Keep the original policies; keep one year of bill statements**

**Automobile**

**Company:** Captain's Auto Insurance  
**Agent:** Robert Stevens  
**Policy #** A123-G6  
**Location:** Safe Deposit Box

**Phone:** 800-573-6218  
**Phone:** 111-209-7456

**Home Owners**

**Company:** State INSCO  
**Agent:** Steve Jenkins  
**Policy #** PK928725-L8  
**Location:** Fireproof Vault

**Phone:** 111-857-6432  
**Phone:** 111-209-7456

**Life**

**Company:** State INSCO  
**Agent:** Mary Stephenson  
**Policy #** FD8JFJFF855  
**Location:** Fireproof Vault

**Phone:** 111-573-6218  
**Phone:** 111-209-7456

**LEGAL**    **Keep all the following permanently**

**Living Will**

**Firm:** Philly and Philly  
**Attorney:** Mr. Philly  
**Surrogate:** Kathleen Mary Smith  
**Location:** 406 Walnut, Cincinnati, OH

**Phone** 111-233-0981  
**Phone:** 111-777-7777  
**Phone:** 111-233-0981

**Will**

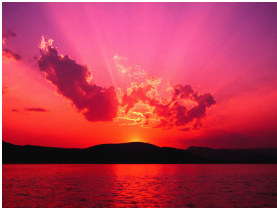
**Firm:** Blowfield, Stevens & Klink  
**Attorney:** Kevin Blowfield  
**Executor:** Albert Jacobson  
**Location:** 1008 Madison Ave, Covington, KY

**Phone** 111-837-9331  
**Phone:** 888-888-8888  
**Phone:** 111-837-9331

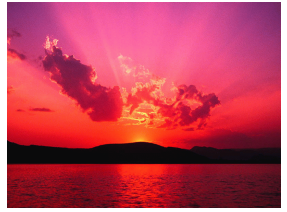
**FUNERAL**

**Funeral Home:** Jenkin Brothers

**Phone:** 111-909-8952



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**Clients**  
**Important Documents List ( )**

**Director:**  
**Pre Arrangement:** No pre-arrangement yet  
**Plot Location:** Garden Grove Cemetary  
**Plot Information:** Plot 2194  
**Other Arrangements:**

**Phone:**

**FINANCIAL**

Keep annual summaries; shred all other information after 1 year; anything related to taxes should be kept with your tax return for 7 years

**Checking**

**Company:** US Bank  
**Account #** 1113472344  
**Access Info:** Access Information...  
**Advisor:** Steve Jenkins

**Phone:** 111-475-8711

**Phone:** 111-209-7456

**Money Market**

**Company:** US bank  
**Account #** 1114597234  
**Access Info:** Access Information...  
**Advisor:** Steve Jenkins

**Phone:** 111-495-8711

**Phone:** 111-209-7456

**SEP IRA**

**Company:** US Bank  
**Account #** 1112745456  
**Access Info:** Access Information...  
**Advisor:** Steve Jenkins

**Phone:** 111-495-8711

**Phone:** 111-209-7456

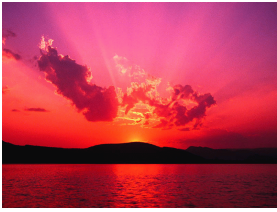
**CREDIT CARDS**

Keep annual summaries; shred all other information after 1 year; anything related to taxes should be kept with your tax return for 7 years

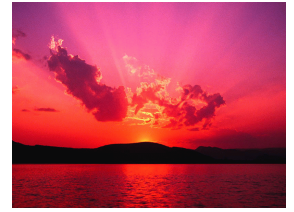
**Master Card**

**Company:** The Banker's Bank  
**Card Type:** Master Card  
**Card #** 8547-3637-4856-5322  
**Card Location:** My wallet

**Phone:** 111-586-9874



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**Clients**  
**Important Documents List ()**

**Sears**

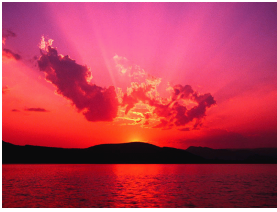
**Company:** Joe's Super Store  
**Card Type:** Sears  
**Card #** 8345-6345-7345-7555  
**Card Location:** My wallet

**Phone:** 111-735-7345

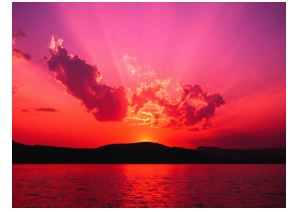
**Visa**

**Company:** Big Bank of Covington  
**Card Type:** Visa  
**Card #** 1111-2222-3333-4444  
**Card Location:** My wallet

**Phone:** 111-957-7731



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**Clients**  
**Important Documents List ()**

## Important Documents - When to Keep, When to Shred

### Toss after 1 year:

- Bills (cable, utilities, phone, etc.)
- Certificates of Deposit (if expired)
- Credit card receipts
- Service agreements
- Social Security
- Warranties
- Bank statements
- Paychecks

### Exceptions:

- Receipts for big purchases you still own; any bills related to taxes, attach to tax return.
- Receipts related to taxes should be attached to the tax return
- Keep most recent agreements for any item you still own if agreement is still good
- Keep current year's award letter; keep annual statements with tax return.
- Keep current ones for items you still have.
- Keep those related to taxes with your tax return.
- Keep weekly ones until W2 is received.

### Toss after 3 years:

- Loan Papers Keep only those you are still paying off.

### Toss after 5 years:

- Medical Records Keep for 7 years if claimed on taxes, keep with tax records; keep as long as you are being treated for the same symptom, otherwise shred after 3 years.

### Toss after 7 years:

- Accident Reports Keep only those still in dispute.
- Tax Returns May keep the actual return for your information only.
- Any bill statements, charitable receipts, interest statements, credit card receipts, generally any business papers over 7 years old may be shredded, if not in the list below...

### Keep Forever

- Appraisals
- Deeds

### Special Notes

- For items you still own; if given to charity, keep 7 years.
- Keep even after sale of property for protection in case of lawsuits

### Disclaimer:

**Every effort has been made to include correct and current information. However, JOHNSON'S RECORD KEEPING SERVICE CANNOT accept any responsibility for the quality of services rendered. Use of this resource directory is strictly voluntary. Rev: 01-24-2015**