

Guide for Family Records

Item	Where	How Long
Personal and Family		
Birth, marriage and death certificates	Safe-deposit box or fireproof home storage	Permanently
Adoption and custody papers	Safe-deposit box or fireproof home storage	Permanently
Citizenship papers	Safe-deposit box or fireproof home storage	Permanently
Divorce and separation papers	Safe-deposit box or fireproof home storage	Permanently
Settlement agreements	Safe-deposit box or fireproof home storage	Permanently
Military papers	Safe-deposit box or fireproof home storage	Permanently
Will	Signed original with probate division of circuit court or Safe-deposit box (if jointly rented); copy in home file	As long as in effect
Advance directive (living will/durable power of attorney for health care)	Home file, Safe-deposit box and copies with agents and family members	Permanently (update as needed)
Passports	Home storage or safe-deposit box	Until replaced
Social Security card	Original in safe-deposit box; copy in home storage	Permanently
Diplomas, transcripts	Home storage or safe-deposit box	Permanently
Medical history	Home file	Permanently (update as needed)
Employment records	Home file	Permanently
Inventory of valuable papers and advisers	Home file; copy with trusted family member or friend	Permanently (update at least annually)
Property		
Real property deeds, title papers, abstracts, mortgage and other lien documents (include rental property)	Safe-deposit box	Duration of ownership or longer if needed for tax purposes
Burial lot deed	Safe-deposit box	Duration of ownership
Tax assessment notices, purchase contracts, records of capital improvements (include rental property)	Safe-deposit box	Duration of ownership or longer if needed for tax purposes
Motor vehicle titles, purchase receipts and licenses	Safe-deposit box	Duration of ownership
Records of auto service/repair	Home file	Duration of ownership
Jewelry and other valuable items	Safe-deposit box if safety of family may be threatened if kept in home	Duration of ownership
Inventory of household goods and appraisals (include rental property)	Safe-deposit box; copy in home file	Permanent (update at least annually)

Financial

Stocks, bonds and other securities	Safe-deposit box; listing in home file	Duration of ownership or longer if needed for tax purposes (usually up to six years)
Bank accounts, account registers and statements	Home file	Duration of ownership or longer if needed for tax purposes (usually up to six years)
Canceled checks	Home file for nontax deductible expenditures	Three years minimum
Savings certificates	Safe-deposit box; listing in home file	Duration of ownership or longer if needed for tax purposes (usually six years)
List of credit cards, credit contracts, agreements, records of credit payments and account statements	Home file	Duration of account or obligation or longer if needed for tax purposes (usually six years)
Insurance policies and records of claims made and paid	Home file; list of policies in safe-deposit box	Permanently (update as needed)
Copies of past tax returns	Home file	Six years minimum
Receipts and records of deductible expenses, including home improvement expenses, income and tax payments	Home file (current); fireproof home storage after filing of taxes	Six years minimum; life of property for improvements

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