The Where Is It? Family Checklist

25 things to find in under a minute

Think about the last time you needed a policy number, a passport or the Wi-Fi login in a hurry. Someone in your house knew where it was, or nobody did. This checklist shows you which.

1. Read each item and check the box if you could find it in under a minute.
2. Write where it lives in the blank. Keep it short: "blue folder, bottom drawer" works.
3. Ask a partner or adult family member to try three of them without your help.

Identity

Items 1 to 5

- [ ] 1. **Passports for everyone in the household**
  Number, expiration date and where the physical copy sits
  Where it is _____
- [ ] 2. **Social Security cards or numbers**
  Adults and children
  Where it is _____
- [ ] 3. **Birth certificates**
  Originals or certified copies
  Where it is _____
- [ ] 4. **Driver's licenses and state IDs**
  A photo of the front and back
  Where it is _____
- [ ] 5. **Marriage certificate or divorce decree**
  Skip this one if it does not apply
  Where it is _____

Money

Items 6 to 10

- [ ] 6. **Main bank account**
  Bank name, account type and where the login is kept
  Where it is _____
- [ ] 7. **Retirement accounts**
  401(k), IRA or pension, and who holds each
  Where it is _____
- [ ] 8. **Credit cards**
  A list of every card and the bank behind it
  Where it is _____
- [ ] 9. **Mortgage or rent paperwork**
  Lender or landlord, and the monthly due date
  Where it is _____
- [ ] 10. **Last year's tax return**
  Plus the name of the person who prepared it
  Where it is _____

A planning aid. Not legal, tax, medical or financial advice. Write down where things are. Never write down the passwords themselves.

Protection

Items 11 to 15

- [ ] 11. **Health insurance cards**
  Member and group numbers for each person
  Where it is _____
- [ ] 12. **Home or renters insurance**
  Company, policy number and agent phone
  Where it is _____
- [ ] 13. **Auto insurance**
  Company, policy number and claims line
  Where it is _____
- [ ] 14. **Life insurance**
  Policy number and who the beneficiary is
  Where it is _____
- [ ] 15. **Doctors, medications and allergies**
  Names, phone numbers and what each person takes
  Where it is _____

Home and daily life

Items 16 to 20

- [ ] 16. **Home deed or lease**
  Where the original lives
  Where it is _____
- [ ] 17. **Vehicle titles and registration**
  One entry for each car
  Where it is _____
- [ ] 18. **Utility and bill accounts**
  Provider, account number and who pays
  Where it is _____
- [ ] 19. **Streaming and subscription logins**
  Netflix and the rest, including which email they use
  Where it is _____
- [ ] 20. **Phone and device passcodes**
  Where they are kept, so a trusted adult is not locked out
  Where it is _____

If something happens

Items 21 to 25

- [ ] 21. **Will, trust or power of attorney**
  Where the signed copies are and your attorney's name
  Where it is _____
- [ ] 22. **Healthcare directive or living will**
  Who holds the copy
  Where it is _____
- [ ] 23. **Who to call first**
  Two people, with phone numbers
  Where it is _____
- [ ] 24. **Where your logins live**
  Password manager, notebook or Vault
  Where it is _____
- [ ] 25. **A person who knows where all of this is**
  Name the one person and tell them
  Where it is _____

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Count your checks

Be honest. Nobody sees this page but you.

My score: _____ out of 25

22 to 25
WELL ORGANIZED
You know where things are. Check that one trusted person knows too, and put a reminder on your calendar to update this list each year.

14 to 21
CLOSE, WITH GAPS
Most households land here. Pick the three unchecked items that would hurt most if you needed them tomorrow, and find them this week.

0 to 13
START SMALL
Do not try to fix everything. Start with Protection, items 11 to 15. Insurance and medical details matter first when something goes wrong.

What to do next

1. Fill in the blanks on pages 1 and 2 today. It takes about 20 minutes.
2. Tell one trusted adult where this sheet lives.
3. Store this sheet somewhere safe. It points to your information and does not contain your passwords.
4. Gaps in the "If something happens" group (items 21 to 25) are the ones to fix first.

Tired of paper that goes stale?

Orderly Vault keeps all 25 items in one secure place your household opens from a phone, with sensitive numbers masked and sharing you control, section by section.

Try it free at orderlyvault.com

14 days free. No credit card. $120/year if you keep it.

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