

# Essential Documents to Keep and Copy

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## IDENTITY & DEPENDENT STATUS

Passports (valid for at least 6 months)

Visas

Birth certificates

Marriage certificate/s

Divorce documentation

Notes:

## FINANCIAL

W-2 forms (or other employer issued evidence of annual salary) for past two years.

Most recent pay slips, covering at least two months and evidence of year to date earnings.

Most recent bank statements, covering at least two months, including all pages.

Most recent statements for any other income sources, covering at least two months.

Existing mortgage payment statement.

Social Security card / number

Credit cards

Loan documents

## HEALTH

Health records

Vaccination records (especially for children)

Health Insurance details

National Insurance card

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## HOME

- Contact details - property maintenance and management
- Home title
- Home insurance policy
- Renter agreement

## SCHOOLS

- School transcript / evidence of level of study achieved
- Contact details for school and last teacher
- Exam certificates

## EMPLOYMENT

- Relocation package/policy
- Academic certificates
- Professional qualification certificates
- Resume
- Contact details for references

## GENERAL

- Contacts - Friends, family, legal and professional services
- Will
- Trust
- Living Will / Advance Directive of Health Care
- Overview of Estate

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## OTHER

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