

Room sorting sheet

Complete by hand. One sheet per room; print another when a room fills.

Photograph the room before touching anything. Number every box and bin.

This room

Address

Room

Inventory date

Item 1

Item or category

Decision, circle one: keep / find owner / review / donate / sell / dispose

Photo taken, circle one: yes / no

Box or bin number

Value note

Decided by

Date

Notes

Room sorting sheet (continued)

Item 2

Item or category

Decision, circle one: keep / find owner / review / donate / sell / dispose

Photo taken, circle one: yes / no

Box or bin number

Value note

Decided by

Date

Notes

Room sorting sheet (continued)

Item 3

Item or category

Decision, circle one: keep / find owner / review / donate / sell / dispose

Photo taken, circle one: yes / no

Box or bin number

Value note

Decided by

Date

Notes

Possession is not ownership. Disputed items are preserved for the estate.

Papers box: keep indefinitely, keep until the rule runs out, shred

Category rules only. The rows below carry the federal tax rule and the consumer shred rule printed beside them. There is no single retention number for every paper in an estate, and this sheet states none.

Keep indefinitely, in a locked place

Consumer guidance from the FTC keeps these papers indefinitely, in a locked place. [A3]

Wills, location

Death certificates of family members, location

Powers of attorney, location

Keep until the rule runs out

Titles, deeds, and leases: as long as the property is owned. Tax records: until the limitations period for the return expires, generally 3 years from filing, 6 years if unreported income exceeded 25 percent of the gross income shown on the return, no limit for a fraudulent or never-filed return. Property records: until the limitations period for the year of a taxable disposition expires. [A2, A3]

Titles, deeds, and leases; property owned until

Tax records, return year

Tax records, limitations period (3 years, 6 years, or no limit)

Property records, disposition year

Papers box: keep indefinitely, keep until the rule runs out, shred (continued)

Shred

Shred documents with personal or financial information when you dispose of them. Credit offers, ATM receipts, and expired cards are shred candidates; a community shred day substitutes for a home shredder. [A3]

Shred pile, where it waits

Community shred day, date and place

Papers you identified that fit no row above

Paper or category

Your rule for it and why

Estate-filed records answer to the estate and the court, not to a consumer category row.

Sources for this sheet: irs-305, ftc-shred. Full citations follow.

Mail stop strip for an empty house

USPS Hold Mail holds all mail for an eligible address, including accountable mail, at the post office for not less than 3 days and not more than 30 days, with no fee. The ceiling is per request; there is no indefinite hold.

Hold Mail request

Hold Mail requested, circle one: yes / no

Start date

End date, within 3 to 30 days of the start

Request method, circle one: usps.com sign-in / PS Form 8076 / Customer Care Center

Pickup or delivery on the end date

Mail picked up within 10 days after the end date, circle one: yes / no

The deceased person's mail

Forwarding all of the deceased person's mail to a different address requires an in-person change-of-address request at a post office with documented proof of appointment as executor or administrator. A death certificate alone is not enough. Family who shared the address may open and manage the mail. [A11]

Forwarding all mail, status

Hold Mail cannot be combined with an active Premium Forwarding Service authorization.

Sources for this sheet: usps-dmm, usps-deceased. Full citations follow.

Filled example: one kitchen

Sample only. All names, businesses, and places are fictional, and phone numbers use the 555 prefix. The example shows a decision mix, not a recommendation of what to discard.

This room (example)

Address: 12 Example Lane, Example Town

Room: Kitchen

Inventory date: October 17, 2026

Family contact: Jordan Example, 555-0134

Item 1 (example)

Item or category: Cast-iron and enamel cookware

Decision: keep

Photo taken: yes

Box or bin number: B-4

Value note: thrift and consignment prices written beside two pieces

Decided by: Rowan Example

Date: October 17, 2026

Notes: listed on the estate inventory

Filled example: one kitchen (continued)

Item 2 (example)

Item or category: Drawer of bank statements and credit offers

Decision: review

Photo taken: yes

Box or bin number: P-1, the papers box

Value note: left blank, papers are not valued here

Decided by: Rowan Example

Date: October 17, 2026

Notes: sorted into the papers sheet; credit offers pulled for shredding

Item 3 (example)

Item or category: Tin of family photographs

Decision: find owner

Photo taken: yes

Box or bin number: P-2

Value note: left blank

Decided by: Rowan Example

Date: October 17, 2026

Notes: the family is being asked before anything moves

Filled example: one kitchen (continued)

Item 4 (example)

Item or category: Two half-used paint cans under the sink

Decision: dispose

Photo taken: yes

Box or bin number: none, stays in place until collection day

Value note: left blank

Decided by: Rowan Example

Date: October 17, 2026

Notes: Rowan Example called the local environmental agency about the next household hazardous waste collection date

Possession is not ownership. Disputed items are preserved for the estate.

Sources and official instructions

[irs-305] Tax Topic No. 305, Recordkeeping. Internal Revenue Service. Checked October 17, 2026.

<https://www.irs.gov/taxtopics/tc305>

[ftc-shred] Protecting Your Personal Information: Which Documents To Keep and Which To Shred. Federal Trade Commission. June 10, 2025; checked October 17, 2026.

[https://consumer.ftc.gov/consumer-alerts/2025/06/](https://consumer.ftc.gov/consumer-alerts/2025/06/protecting-your-personal-information-which-documents-keep-which-shred)

protecting-your-personal-information-which-documents-keep-which-shred

[usps-dmm] Domestic Mail Manual, section 508, Recipient Services, including Hold Mail Service. United States Postal Service. Current edition; checked October 17, 2026.

<https://pe.usps.com/text/dmm300/508.htm>

[usps-deceased] Mail Addressed to the Deceased. United States Postal Service. Checked October 17, 2026.

<https://www.usps.com/manage/mail-for-deceased.htm>