

Room sorting sheet

Complete by hand, one sheet per room. Photograph the room before touching anything, and number every box and bin.

This room

Address _____

Room _____

Inventory date _____

Room photographed before anything moved, circle one: yes / no

Decision codes: K keep, F find owner, R review, D donate, S sell, X dispose. Nothing leaves the room without a code.

#	Item or category	Code	Photo Y/N	Box or bin	Decided by, date
1					
2					
3					
4					
5					
6					
7					
8					
9					

Write values and contested items on the room notes sheet, using the same row number.
Possession is not ownership. Disputed items are preserved for the estate.

More items for this room

Print this sheet as often as a room needs. Continue the row numbers from the room sorting sheet.

Room _____

Decision codes: K keep, F find owner, R review, D donate, S sell, X dispose. Nothing leaves the room without a code.

#	Item or category	Code	Photo Y/N	Box or bin	Decided by, date

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

Room notes: values and contested items

Use the row number from the room sorting sheet. A value note records where a figure came from, such as a thrift or consignment shop price. Anything another family member asks for goes to review, not into a bin.

Room _____

#	Value note and where the figure came from	Review: who else asked, what was agreed

Contested items stay in the house or in labeled storage until the family or the estate decides.

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. [ftc-shred]

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. [irs-305, ftc-shred]

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. [ftc-shred]

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. [usps-dmm]

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. [usps-deceased]

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

Room photographed before anything moved: yes

Decision codes: K keep, F find owner, R review, D donate, S sell, X dispose. Nothing leaves the room without a code.

#	Item or category	Code	Photo Y/N	Box or bin	Decided by, date
1	Cast-iron and enamel cookware	K	Y	B-4	Rowan Example, Oct. 17
2	Drawer of bank statements and credit offers	R	Y	P-1, papers box	Rowan Example, Oct. 17
3	Tin of family photographs	F	Y	P-2	Rowan Example, Oct. 17
4	Two half-used paint cans under the sink	X	Y	none, left in place	Rowan Example, Oct. 17

Filled example: one kitchen (continued)

Room notes (example)

#	Value note and where the figure came from	Review: who else asked, what was agreed
1	Thrift and consignment prices written beside two pieces	No one else asked. Listed on the estate inventory.
2	Left blank; papers are not valued here	Sorted into the papers box sheet; credit offers pulled for shredding.
3	Left blank	The family is being asked before anything moves.
4	Left blank	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>