

# Guide to Home Filing Systems

## Addresses & Dates

Business  
Personal  
Christmas card list  
Birthdays, etc  
Magazine subscriptions

## Bank Records

Checking accounts  
Savings accounts  
Loan contracts  
Safety deposit box  
(list of contents)

## Cars (and Vehicles)

Payments  
Titles  
Maintenance/Repair  
(Insurance)

## Children

School/Education  
Medical records  
Birth certificates  
Friends' contacts

## Correspondence (General)

Business  
Personal

## Credit

One folder per card /account

## Education

Paperwork  
Proof of attendance/grades  
Loans

## Employment Records

Pay stubs  
Employment contracts  
Retirement/pension plans  
Social security records  
Fringe benefits

## Equipment, Appliances

Warranties  
Manuals/Directions (box)  
Repairs

## Financial Records

Budget  
Net worth statement  
Records of earnings  
Records of expenditures  
Loan contracts

## Home Bills

Utility  
Furniture  
Phone(s)

## Home Services

Lawn care  
Childcare  
Maid services  
Remodeling & Repairs

## House

Mortgage payments  
Lease and rent payments  
Property tax records  
Household inventory  
(2nd copy in safe dep box)  
Floor plan  
Wiring diagrams

## Income Tax

Previous returns  
Cancelled checks  
(related to tax)  
Deductions

## Insurance Policies

Automobile  
Health  
Disability  
Homeowners  
Life

## Investments

Annuities  
Bonds—records of  
Stocks—records of  
Real estate investments  
Other investments

## Legal Documents

Small claims  
Car accidents  
Traffic tickets

## Medical & Dental

Tests  
Procedures  
Appointments  
Prescriptions  
Bills/receipts

## Organizations

One folder per  
organization/association

## Personal Records

Marriage license  
Military records  
Wills  
Copy of Birth certificates  
Divorce papers

## Pets

Registration Papers  
Medical records

## Receipts

Personal  
Business  
Donations (or in **Tax** file)

## Reference Material

Cleaning  
Crafts or hobbies  
Entertainment  
Gardening  
Magazine articles  
Nutrition  
Other interests

## Rental Property

All properties and  
Important documents

## Retirement

Retirement documents  
Pension plans  
Social Security notices

## Travel

Maps  
Vacations  
Frequent Traveler



