

SAMPLE FILING SYSTEM

*Listed below is one possible method for setting up a home filing system.
Adopt a system that fits your needs and those of your family.*

Accounts and Records

- » Automobile Records
- » Education Records
- » Employment Papers and Records of Earnings
- » Funeral and Burial Instructions
- » Family Account Book/Record of Expenditures
- » Health Records
- » Household Inventory
- » Income Tax Records
- » Letter of Last Instructions
- » Net Worth Statements
- » Retirement Papers
- » Warranties, Care Manuals and Instruction Booklets
- » Will and Trust (copy)

Bills—Unpaid

- » Installment Agreements and Loan Contracts
- » Unpaid Bills

Banking, Savings, and Investment Records

- » Canceled Checks and Bank Statements
- » Deposit Slips
- » Safety Deposit Box—List of Contents
- » Savings and Investment Records

Bills—Paid

- » Canceled Contracts
- » Credit Card Payments
- » Receipts and Records of Payments:
 - › Automobile
 - › Business-related
 - › Clothing
 - › Education
 - › Food
 - › Furnishings and Equipment
 - › Gifts and Contributions
 - › Housing
 - › Insurance
 - › Medical and Dental
 - › Recreation and Entertainment
 - › Taxes (Income, Property, Personal Property, etc.)
 - › Utilities

Correspondence

Insurance Policies

- » Automobile
- » Health and Accident
- » Homeowners/Renters
- » Liability
- » Life
- » Other

List of Valuable Records

Organizations

- » Church
- » School
- » Other

Personal

- » Addresses
- » Birthdays
- » Christmas Card List
- » Gift Suggestions

Reference Material

- » Budgeting
- » Child Care
- » Cleaning
- » Clothing
- » Crafts
- » Equipment
- » Foods and Nutrition
- » Gardening
- » Health and Safety
- » Home Furnishings
- » Housing
- » Landscaping
- » Laundry
- » Remodeling—Building and Repair

Notes