



## **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