

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)

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

Bills—Unpaid

- ▶▶ Installment Agreements and Loan Contracts
- ▶▶ Unpaid Bills

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