**Household Document Planning & Filing System**

**A to Z**

**Addresses**

Business

Personal

Holiday Cards

**Automobiles & Recreational Vehicles**

Maintenance

Registration

Service

Titles

**Banking**

Checking accounts

Credit card statements

Loans

Safe deposit box

Savings accounts

**Birthdays, Anniversaries & Important Dates**

**Children**

Babysitting

Child Care/After School Care

Lessons

School Trips

School Tuition

Sports

**Correspondence & Letters**

Business

Personal

**Divorce**

Child Custody

Settlement Agreement

**Employment**

Historical employment records

Paycheck stubs

Resume

Retirement/401K plans

Social security statements

**Equipment and Manuals**

Instruction and User’s Manuals

Home Inventory (for insurance)

Receipts

Warranties

**Finance**

Household budget

Loan documents

Paid/unpaid bills

Property tax records

Receipts

Trusts

**Hobbies**

**Housing**

Home improvements

Home inventory

Key contacts (electrician, plumber, handyman, Homeowner’s Association)

Lease/rent

Mortgage

Repairs and maintenance

Resource manual (lightbulb sizes, furnace filter sizes, paint colors, etc.)

Utilities (electricity, gas, phone, cable, water)

**Income Taxes**

Current year information

Past years’ tax returns

Supporting documentation

**Insurance**

Automobile and recreational vehicles

Medical and dental

Disability

Life

Homeowners

**Investments**

Stocks and bonds

Real estate

Retirement

Other

**Medical/Dental**

Chiropractic/Other

Dentist contact information

Doctor contact information

Immunization Records

Insurance (medical, dental, disability)

Prescriptions

Specialists

Vision

**Memberships and Clubs**

Civic

Health and fitness clubs

Magazines

Professional organizations

Religious

Subscriptions

**Personal Records**

Birth certificates

Educational

Family history

Marriage license

Military

Passports

Wills and trusts