**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