



SUGGESTED FILING CATEGORIES

AUTOMOTIVE & OTHER MOTOR VEHICLES (separate file for each vehicle)

Maintenance and repair records, warranties, purchase records, lease agreements, auto loan papers, DMV registration, AAA membership

EDUCATION (separate file for each child or family member)

Current year registration, roster, school policies, report cards, copies of transcripts and degrees

FINANCIAL (separate file for each account or financial institution)

Bank and credit card statements, investment and retirement accounts, income tax returns, business expense receipts, tax deductible contributions

HEALTH & MEDICAL (separate file for family member)

Health insurance information and forms, immunization records, dental records, results from health screenings and tests, physician and hospital info

HOME & REAL ESTATE

Escrow and loan documents, home improvement receipts, warranties, instruction manuals, design ideas, utility bills and information, landscaping and pool maintenance

INSURANCE (separate file for each policy)

Homeowner, life, umbrella, general liability, auto, disability and any other insurance policies, records for any claims involving a family member

LEGAL

Important documents such as passports, birth, marriage and death certificates, copies of wills, trusts and other estate documents, records of court proceedings, divorce papers

PERSONAL

Pet records, lists of important dates, wish lists, travel information, newspaper clippings, magazine articles, family genealogy, mementos, calendars of events

WORK

Employment contracts, resumes, HR documents, employer policies, employee handbook, job applications, reference letters

Note: Any documents containing personal info (e.g. credit card and bank account numbers, social Security, tax I.D., and passport numbers, and other personal information which can be used for identity theft should be kept in a securely locked file or safe.