

# Home Filing System Categories

Below you will find an extensive list of things you may include in your Home Filing System. Your situation may dictate needing fewer categories, or more categories. Only you can decide what works best for you to retrieve papers later when you need them. Also, some items in the categories below may repeat themselves where I felt they could go in either category logically. Again, it's personal preference. These are just a guideline to help you with your home filing system. And lastly, not all of these filing categories need to be in a hanging file folder in a filing cabinet! Some may be in their own filing system, some on your computer, etc. Do what works best for you, saves space and is convenient and a system that you will actually use!

## **Addresses**

- Business
- Personal
- Christmas card list

## **Autos and Vehicles**

- Titles
- Maintenance and service
- Recreational Vehicles
- Boats
- Motorcycles
- Insurance (or you can put these with other insurance papers)

## **Bank Records**

- Checking accounts
- Savings accounts
- Safety deposit box list
- Loans
- Trusts

## **Children's Daycare, Preschool and School**

- Contracts and fees
- Important dates

## **Correspondence**

- Business (I would put this with whatever category it belongs)
- Personal

## **Dates**

- Birthdays, anniversaries and other special dates

## **Employment Records**

- Employment contracts
- Retirement or pension plans
- Social security records
- Fringe benefits
- Wage statements or paycheck receipts
- Resume

## **Equipment, Appliances, & Furnishings**

List of items and dates purchased

Receipts

Warranties

Use and care manuals for anything you own (ex. fridge, lawnmower, camera, etc.)

## **Financial Records**

Budget

Net worth statement

Goals, long-term plans

Records of earnings

Records of expenditures

Loan contracts

Credit card numbers

Property tax records

Unpaid bills

Receipts and paid bills

## **Health and Medical Records**

Immunizations

Dental

Eye corrections

Prescriptions

Insurance – health, dental and disability

## **Housing**

Mortgage payments

Lease and rent payments

Repairs/service

Capital/home improvements

Household inventory (2nd copy in safe deposit box)

Utilities

Telephone

Floor plan

Wiring diagrams

Homeowner's or renter's insurance

## **Income Tax**

Previous returns

Cancelled checks (tax related)

Current year information (medical receipts, contributions)

## **Insurance Policies**

Automobile

Health

Dental

Disability

Homeowners

Life

Other

**Investments**

- Annuities
- Bonds - records of
- Stocks - records of
- Real estate investments
- Retirement plans
- Other investments

**Memberships**

- Fitness club
- School
- Church
- Business/Professional organizations
- Civic
- Magazines and Journals

**Personal Records**

- Educational records
- Marriage license
- Military records
- Wills
- Birth certificate
- Divorce papers
- Medical records
- Pet records

**Reference Material**

- Articles of interest (from magazines, websites etc.)
- Cleaning and laundry tips
- Gardening information
- Diet and Nutrition
- Maps
- Hobbies

And anything else you need to keep organized and available to find quickly and easily!