Sample Filing System

Listed below is one possible method for setting up a home filing system. You should 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 or 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

For additional tools for caregiving or aging, visit www.CaregiversLibrary.org
• Installment Agreements and Loan Contracts
• Unpaid Bills

**Correspondence**

**Insurance Policies**

• Automobile
• Health and Accident
• Homeowner’s/Renter’s
• 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

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