

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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