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!