

FILES THAT YOU MAY HAVE AND NEED TO ORGANIZE

I have been talking about the different files that need to be organized. You may have been thinking that you are not even sure which files you have. Some documents we only need once in a great while. Some documents we look at regularly. I have compiled a list of documents that may apply to you. Reading this list will trigger your memory if those records apply to you. I have categorized the documents into the four main types. Use this list as a template for the order in your filing system.

Personal Records

- Birth Certificates
- Marriage License
- Social Security Numbers
- Funeral Arrangements
 - Next of Kin
 - Other People to Notify
- Living Will
- Will
- Trusts
- Trust Protector
- Death Certificates
- Pre-Nuptial Agreement
- Divorce and Separation Papers
- Military Discharge Papers
- Power of Attorney
- Identity Theft Protection Service
- Financial Plan
- Household Services
- Family Medical History
 - Immunization Records
- Passports
- Membership Organization
- Resume
- Safe Deposit Box Inventory
- Employment Contract
- Tax Returns
- Travel Benefit Packages
- Religious Records
- Passwords
- Immigration Records
- Pending or Finalized Transactions

Assets

- Cash
- Checking Accounts
- Savings Accounts
- Money Market Funds
- Certificates of Deposit
- Mutual Funds
- Annuity Contracts
- Stocks
- Bonds
- Benefit Plans
- Social Security Benefits
- Prepaid Tuition Plans
- Rental Property
- Real Estate
- Receivables
- Titles
- Business
- Collector's Items
- Intangible Assets

Liabilities

- Home Mortgage
- Home Equity Loans
- Consumer Loans
- Credit Cards
- Lines of Credit
- Education Loans
- Co-Signed Loans
- Legal Settlements
- Back Taxes

Insurance

- Life Insurance
- Health Insurance
- Disability Insurance
- Homeowners Insurance
- Mortgage Insurance
- Automotive Insurance
- Umbrella Insurance
- Other Insurance