## Home File Organization Categories PLANNING WORKSHEET

HOME	PRIORITY	FAMILY
Insurance	Upcoming Bills	Family Member:
Bills	Upcoming Appointments	☐ Identification Documents
☐ Hydro	Other:	☐ Life Insurance
☐ Gas	Other:	☐ Medical Documents
☐ Water		☐ Employment Documents
Phone	Other:	
☐ TV/Streaming ☐ Maintenance Costs		
	AUTO	Family Member:
	Insurance	Life Insurance
	Bills/Maintenance Costs	☐ Medical Documents
Mortgage or Rental Agreement		☐ Employment Documents
	Leases	
Personal Home Inventory (Keep a copy outside the home too)	Manuals	
Home Services	Previous Vehicles	Child:
Maintenance (electrician, plumber, etc.)	Other:	☐ Identification Documents
Cleaners	Other:	☐ Medical Documents
☐ Landscaping		☐ Teachers (names, school, contact)
☐ Lawn Services	BANKING	☐ Report Cards
	Mortgage	Child:
	Loan Documents	☐ Identification Documents
Manuals	Credit Card Agreement	☐ Medical Documents
☐ Appliances ☐ Electronics	Investment Records	☐ Teachers (names, school, contact)
☐ Computers and Phones	Bank Statements	Report Cards
Outdoor Equipment	Taxes (Sort by Business or Family Member)	
	Current Tax Year	<u> </u>
<u> </u>	Previous Tax Year(s)	Pet(s):
	Other:	☐ Vet information
Warranties		☐ Animal Licenses
☐ Appliances	Other:	
☐ Electronics		Other:
☐ Computers and Phones ☐ Outdoor Equipment	HEALTH	
Software	Health Insurance	Other:
Other:	Medical Documents	Other:
Other:	Doctor's Contact	
Other:	Dental Documents	OTHER:
Other:	Other:	
Other:	Other:	
Other:	Other:	