Home File Organization Categories PLANNING WORKSHEET

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