

## ***PERSONAL RECORD SYSTEM***

Outlined below is a suggested format for organizing your personal and family records. This system suggests 14 major categories. Each category can be maintained in separate accordion files with individual folders containing the various documents associated with that category. Records that are maintained on a personal computer should be printed and filed in the appropriate category. You may want to keep the original of some documents in a safe deposit box. Copies of all original documents that are stored elsewhere should be kept in your Personal Record System.

<b>Category</b>	<b>Title</b>	<b>Documents</b>
1	Family	Birth, death, and marriage certificates; Social Security cards; adoption, divorce and citizenship papers.
2	Financial Management	Current budget; personal financial statements; list of important people; list of financial goals; contents of safe deposit boxes.
3	Financial Services	Bank statements; cancelled checks; bank reconciliations; checkbook and blank checks.
4	Housing	Mortgage documents; deed; lease (when renting); home repair receipts; property tax documents.
5	Automobile	Auto title; service and repair receipts; purchase documents; warranty info; owner's manual.
6	Insurance	All policies (home, auto, life, health); claim papers.
7	Major Purchases	Receipts (purchase, service, repair); owner's manuals; warranty information.
8	Credit	Credit card statements and receipts; installment loan contracts and payment books.
9	Taxes	Prior tax returns; receipts for current year tax deductions; 1099 and W-2 forms.
10	Employment	Resumes; current pay and benefit information.
11	Investments	Broker and savings statements; investment documents (stocks, bonds, mutual funds); 401k and IRA documents.
12	Estate Planning & Retirement	Will; power of attorney; pension plan info; Social Security documents.
13	Military & VA	Enlistment & discharge papers; military award and training certificates; promotion and assignment orders.
14	Medical	Medical reports and prescription information.

**13-6. LOCATION OF IMPORTANT DOCUMENTS WORKSHEET**

**WILLS**

Will For	Dated	Attorney	Location of Document

**POWER OF ATTORNEY**

Power of Attorney For	Power Given To	Date	Location of Document

**BIRTH CERTIFICATES**

Certificate For	Date of Birth	Certificate Number	Location of Document

**DEATH CERTIFICATES**

Certificate For	Date of Death	Certificate Number	Location of Certificate

**MARRIAGE LICENSES**

License For	Date of Marriage	Certificate Number	Location of Certificate

**DIVORCE DECREES**

Divorce Decree Of	Date of Divorce	Certificate Number	Location of Document

**SOCIAL SECURITY RECORDS**

Soc. Sec. Records Of	Social Security No.	Date Received	Location of Document

**LOCATION OF IMPORTANT DOCUMENTS WORKSHEET (Continued)**

**REAL ESTATE RECORDS**

Property Location	Type of Record	Dated	Location of Document

**AUTOMOBILE RECORDS**

Registration Number	Title Number	Dated	Location of Document

**LIFE INSURANCE POLICIES**

Policy on Life Of	Policy Number	Company	Location of Document

**SAFETY DEPOSIT BOXES**

Registered In Name Of	Name of Institution	Box Number	Location of Keys

**CHURCH RECORDS**

Type of Record	Record For (Name)	Date of Event	Location of Document

**MILITARY RECORDS**

Type of Record	Record For (Name)	Date of Event	Location of Document

**OTHER IMPORTANT RECORDS**

Type of Record	Record For (Name)	Dated	Location of Document