Checklist – Home Files

We typically use only 20 percent of the paper we keep. This means our filing cabinets probably contain many papers we really don't need. If your file system is bulging, it's time to sort and purge its contents.

First, check with your accountant for guidelines regarding how long to keep things such as paid bills and cancelled checks. Usually you're only required to keep those documents that are considered supporting documents to your tax returns.

Next, begin releasing unnecessary documents. Shred any paper containing account numbers and/or other personal information. If it's an option, choose to receive future bills electronically and store them on your hard drive. In the future, when you're filing paper, have the mindset **you file to retrieve; you do not file to store.** The objective is to be able to *retrieve* information quickly when you need it.

Here's a list of files no home should be without:

☑	**Files**
	Bank statements
	Benefit information
	Cancelled checks
	Credit card information
	Employment records
	Hobbies/Interests
	Household repair/Improvement records and receipts
	Insurance information for auto, disability, home, life, medical
	Medical information such as health insurance and long-term healthcare
	Receipts for current year's income tax return
	Receipts of paid bills
	Resume
	Retirement/Investment statements
	School file for each child
	Vacation Ideas
	Warranties and manuals

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