

# Organizing Your Important Papers

# Financial Wellness



**Directions:** Choose a place in your home to organize and store financial records and important documents. It is sometimes hard to determine what to keep and what to toss, or throw away. Here's a helpful guide.

Keep	Toss
<b>Money/Financial Records</b> <ul style="list-style-type: none"> <li>Income tax documents for 7 years</li> <li>Receipts or papers to documents expenses for tax purposes for the current year (childcare expenses, rent receipts, pay stubs)</li> <li>Bill statements with amount owed, due date, and account numbers</li> <li>EBT information</li> </ul>	<ul style="list-style-type: none"> <li>Tax documents over 7 years old</li> <li>Receipts for non-tax purposes after they've been accounted for in your budget (trash and garbage expenses, gas receipts, family grocery receipts)</li> <li>Additional paper from bill envelopes</li> <li>Offers for credit cards or other offers you didn't ask to receive in the mail</li> </ul>
<b>Family Records</b> <ul style="list-style-type: none"> <li>Birth and death certificates</li> <li>Marriage licenses</li> <li>Divorce decree/custody/support records</li> <li>Green card records</li> <li>Education - Diplomas/GEDs/College</li> <li>Life insurance</li> <li>Car/Truck insurance</li> <li>Homeowner's or renter's insurance</li> <li>Health records</li> <li>Employment records</li> <li>Social Security reports</li> <li>Military Records</li> <li>Medicaid</li> </ul>	<ul style="list-style-type: none"> <li>Old driver licenses</li> <li>Old car records</li> <li>Cancelled insurance records</li> </ul>
<b>Children's Records</b> <ul style="list-style-type: none"> <li>Birth Certificates</li> <li>Immunization and health records</li> <li>School principal and teachers' names and telephone numbers</li> <li>Certificates of achievement</li> <li>Artwork</li> </ul>	

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**Directions:** Create a file folder system to organize your important papers. Choose the labels you will use.

Financial Records				
Income	Bills to Pay	Bills Paid	Coupons	Account Numbers
Tax Papers	EBT/SNAP	Employment Records		
Family Records				
Auto Titles and Insurance	Housing Documents and Insurance	Birth and Death Certificates	Marriage License	Divorce Paperwork, Custody Records
Will and Advance Care Directive	Diplomas, GEDs	Life Insurance	Social Security	Health Records and Insurance
Children’s Records				
Birth Certificates	Immunization and Health Records	School Principal and Teacher Names and Phone Numbers	Certificates of Achievement	Artwork

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**Directions:** Complete this household inventory form for any valuable possessions in your home. You can write down these belongings room by room and keep this list with your important papers. If you ever need to file an insurance claim, this form will be very helpful.

[illegible]

# Why Does Clutter Grow?

# Financial Wellness



**Directions:** You are beginning to get your finances organized. Now, you’re ready to get your home organized. Think about places inside or outside your home where you would like to reduce clutter (Boyce et al., 2005).

Reasons It Develops	Ways to Stop Feeding the Clutter
Kitchen:	
Living Areas:	
Bathrooms:	