

# filing categories

Setting up a filing system is unique for each household. There is no one right way to do it. On the next two pages, you'll find one way to set up a system.

Generally, the fewer main filing categories, the better. (These are the ones that go on the hanging file folders inside a filing cabinet or file box.) You'll find these listed on this page. They are broken out into three broad categories of Financial, Family, and Home.

Then, within each hanging folder, you might have additional subcategories put into manilla or colored file folders. For example, the Credit Card hanging file might have three file folders within it if the family owns three different credit cards. You'll find those listed on the following page. Remember, there is no one-size-fits-all filing system. Use this as a starting point, and customize it to fit your family.

<i>financial</i>	<i>family</i>	<i>home</i>
AUTOMOBILES	EDUCATION	DECORATING
BANKING	EMPLOYMENT	HOME IMPROVEMENT
CREDIT CARDS	FAITH	HOME INSURANCE
INVESTMENTS	HOBBIES	MANUALS/ WARRANTIES
LEGAL/WILLS	INSURANCE: MEDICAL	MORTGAGE/RENT
REAL ESTATE	INSURANCE: DENTAL	PROJECTS
RETIREMENT	INSURANCE: LIFE	RECEIPTS
PAYCHECKS	INSURANCE: DISABILITY	UTILITY BILLS
TAXES	MEDICAL LABS/ REPORTS	

<i>financial subcategories</i>	<i>family subcategories</i>	<i>home subcategories</i>
car #1	school: child #1	phones
car #2	school: child #2	cable/internet
checking account	school: child #3	garbage
savings account	school: child #4	water/sewer
credit card #1	employment: mom	gas/electric
credit card #2	employment: dad	subscriptions
other credit cards	medical dad	
401 K	medical mom	
mutual funds	medical kid #1	
stocks/bonds	medical kid #2	
cds/money market	medical kid #3	
pension	medical kid #4	
social security		
current year's taxes		
donation receipts		