

Organizing Your Financial Records

Use this worksheet as a guide when organizing your finances.

| Financial Record General Category | Specific Items Within Category | Filed | Lockbox | Safe Deposit |
|-----------------------------------|--------------------------------|-------|---------|--------------|
| Automotive/Recreational Vehicles | | | | |
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| Bank Accounts | | | | |
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| Credit | | | | |
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| Employment | | | | |
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| Insurance | | | | |
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| Medical Records | | | | |
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| Personal | | | | |
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| Notes: | | | | |
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Organizing Your Financial Records



Continued...

| Financial Record General Category | Specific Items Within Category | Filed | Lockbox | Safe Deposit |
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| Residence | | | | |
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| Retirement Savings | | | | |
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| Schools | | | | |
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| Social Security | | | | |
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| Towas | | | | |
| Taxes | | | | |
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| Warranties and Receipts | | | | |
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| Wills and Trusts | | | | |
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| Notes: | | | | |
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