

A Sample Filing System

Laura Connerly
Instructor - Family
Resource Management

Are you tired of looking endlessly to find important records? A workable filing system organizes financial records and other papers.

Study the filing system categories on page 2. The following suggestions will also help you make a filing system.

\$ Use good equipment. Buy a 2- or 4-drawer full-suspension filing cabinet. Be sure the drawers are easy to pull open.

\$ Purchase good quality file folders. Some people prefer suspension folders; others choose colored or traditional manila folders. Use file dividers for major categories.

\$ Keep filing cabinet in a convenient, but business-type location – preferably away from food and grease. Use a bedroom, a closet or other low traffic area.

\$ File items where you think you will look first. Label folders as clearly as possible.

\$ Mark papers to be filed with the file name in the upper right-hand corner.
Note: if more than one family member uses the file, discuss coding strategies before you put things away.

\$ Identify the contents of each folder and include the file divider category. This makes it easier to return a pulled folder to its original position.

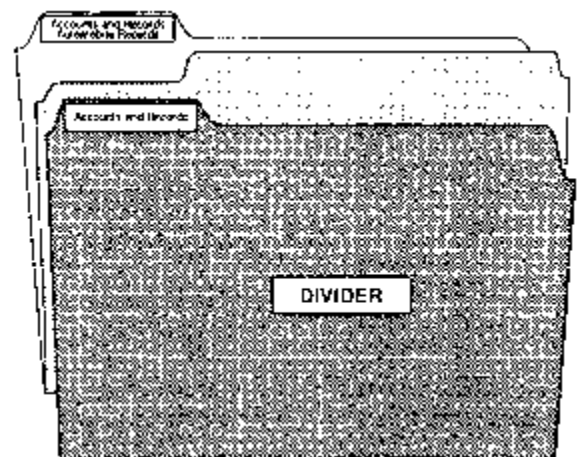
\$ Add file categories and folders at any time. Use this fact sheet as a master record and indicate any changes on it. Store this master record at the front of your filing cabinet.

\$ Code correspondence files by category.

\$ This system is designed for active files. Store older records elsewhere.

\$ Clean files at least once a year.

\$ Some items should never be filed. Leave room for a large wastebasket.



*Arkansas Is
Our Campus*

Visit our web site at:
<http://www.uaex.edu>

A Sample Filing System

Begin today to set up your household filing system. Bold headings are for file dividers, followed by suggested file folder categories. Adopt a home filing system that fits your needs and those of your family. This is just one possible method.

\$ Accounts and Records

Automobile Records
 Education Records
 Employment Papers/Records of Earnings
 Funeral/Burial Instructions
 Family Account Book/Record of Expenditures
 Guarantees/Warranties/Care Instructions
 Health Records
 Household Inventory
 Income Tax Records
 Letter of Last Instructions
 Net Worth Statements
 Retirement Papers
 Will (copy)

\$ Banking, Savings and Investment Records

Canceled Checks/Bank Statements
 Deposit Slips
 Safety Deposit Box – List of Contents
 Savings/Investment Records

\$ Bills – Paid

Canceled Contracts
 Credit Card Payments
 Receipts/Records of Payments
 Automobile
 Business-related
 Education
 Food
 Furnishings/Equipment
 Gifts/Contributions
 Housing
 Insurance
 Medical/Dental
 Recreation/Entertainment
 Taxes (Income, Property, Personal Property, etc.)
 Utilities

\$ Bills – Unpaid

Installment Agreements/Loan Contracts
 Unpaid Bills

\$ Correspondence

\$ Insurance Policies

Automobile
 Health/Accident
 Homeowner's/Renter's
 Liability
 Life
 Other

\$ List of Valuable Records

\$ Organizations

Church
 Extension
 4-H/Other Youth
 School
 Other

\$ Personal

Addresses
 Birthdays
 Christmas Card List
 Gift Suggestions

\$ Reference Material

Budgeting
 Child Care
 Cleaning
 Clothing
 Crafts
 Equipment
 Foods/Nutrition
 Gardening
 Health/Safety
 Home Furnishings
 Housing
 Landscaping
 Laundry
 Remodeling – Building and Repair

This originally appeared in Extension publication, *Your Home Business Center*, by Ellithorpe, V., and Urich, J.R. (1973), Kansas State University Cooperative Extension Service. It was revised for Extension publication, *Organizing Household Records*, by Dr. Joyce Jones, Extension family financial management specialist, Kansas State University, 1990.

Printed by University of Arkansas Cooperative Extension Service Printing Services.

LAURA CONNERLY is instructor - family resource management with the University of Arkansas Division of Agriculture, Cooperative Extension Service in Little Rock.

Issued in furtherance of Cooperative Extension work, Acts of May 8 and June 30, 1914, in cooperation with the U.S. Department of Agriculture, Director, Cooperative Extension Service, University of Arkansas. The Arkansas Cooperative Extension Service offers its programs to all eligible persons regardless of race, color, national origin, religion, gender, age, disability, marital or veteran status, or any other legally protected status, and is an Affirmative Action/Equal Opportunity Employer.