

KEEPING FAMILY / HOUSEHOLD RECORDS (Key)

Instructions: Place the important records listed below in one of the three categories: “Records to Place in Safe Deposit Box”, “Records to Keep in an Active File at Home” or “Records to Discard” After the lesson, you will evaluate where you placed the items and discuss why they should belong under each category.

Records to Place in Safe Deposit Box	Records to Keep in an Active File at Home	Records to Discard
Birth Certificates	Tax Receipts	Salary Statements (after checking on W-2 Form)
Citizenship Papers	Unpaid Bills	Canceled Checks for Cash or Nondeductible Expenses
Marriage Certificates	Education Information	Expired Warranties
Adoption Papers	Loan Statements	Coupons After Expiration Date
Divorce Decrees	Loan Payment Books	Other Records No Longer Needed
Wills	Receipts of Expensive Items Not Yet Paid For	
Death Certificates	Paid Bill Receipts	
Deeds	Current Bank Statements	
Titles to Automobiles	Family Health Records	
Household Inventory	Copies of Wills	
Veteran's Papers	Credit Card Information	
Bonds and Stock Certificates	Inventory of Safe Deposit Box (and key)	
Important Contracts	Insurance Policies	
	Health Benefit Information	
	Employment Records	
	Income Tax Working Papers	
	Current Canceled Checks	
	Appliance Manuals and Warranties	
	Receipts of Items Under Warranty	