

Organizing Your Financial Paperwork “Homework” List

I am excited that you will be joining us at the University of Idaho Extension’s **Organizing Your Financial Paperwork** workshop. We are going to have a great time...and when you leave the workshop, you will be on your way to a more manageable pile of papers.

In order to benefit the most from this workshop, we ask that you bring some things with you to the workshop. If you can’t find these items or don’t have them, not to worry. I will tell you how you can find them or replace them. However, the more you have, the better. We will be putting your financial paperwork to work.

Make sure that you **BRING COPIES NOT ORIGINALS** of your financial paperwork. We will have a short time together and we don’t want to have misplaced originals. You will be working on your own...your information will not be shared with anyone else in the room and you will not be asked to show it to the class.

COPIES of Items to Bring to Class

COPIES (for the whole family) of:

- Credit Cards (including toll free numbers)/Credit Reports
- Personal ID
- Driver’s License
- Social Security Card
- Medicare/Health Insurance Cards
- Blood Type and Allergies
- Organ Donor Card
- Special Medical Information/Health Records
- Routine Prescriptions
- Bank Statement
- Loan Agreements
- Employment and Education Records (Diplomas, licenses to practice)
- Tax Returns and Records
- Insurance Policies
- Deeds/Titles
- Leases/Mortgage
- Contracts
- Copyrights
- Military Records
- Certificates, Stocks and Bonds
- Citizenship Papers
- Adoption Papers
- Marriage Certificates
- Divorce Decrees
- Retirement Accounts
- Certificates of Deposits
- Savings Bonds
- Safe Deposit Box Location and Location of Key (you might tape a key in your binder after the workshop)

- Wills/Trusts
- Loans: Auto, Mortgage, Personal, etc.
- Money Owed to Family/Outstanding Notes/Miscellaneous Debt
- List of Titles for Vehicles Owned
- Insurance Records
 - Life
 - Auto
 - Home
 - Renter’s
 - Accident
 - Health
 - Disability
 - Umbrella
- Real Estate (including cemetery plots)
- Mutual Funds
- Individual Stocks and Bonds
- Other Investments (including IRAs, Retirement Plans and Pensions)
- Living Wills
- Advanced Directives for Health Care
- Durable Power of Attorney
- Guardianship Papers
- Funeral Plan Documents
- Letters of Last Instruction
- Social Security Benefit Statement
- Birth Certificate
- Immunization Records
- Paycheck Stub
- Pet Records
- Warranties

- Christmas Card List/Mailing List/Address Book/Wedding Guest List** – with family and friends including addresses, phone numbers, email addresses, special dates (anniversaries, birthdays, etc.)
- List of Your Important Professional and Business Contacts** – including employers, doctors, clergy, lawyer, accountant, insurance agent, banker, financial advisor, funeral director, real estate agent, human resource manager
- Account Numbers and Contact Information**
 - Checking and Savings Accounts
 - Credit Cards
- Household Inventory** – including pictures of your personal possessions, collections
- Household Budget – Spending and Savings Plan**
- List of Current Expenses and Income**