Files Every Client Needs To Have

- Taxes for Current Year
- Taxes for Previous Year
- All other years should be kept in a long term storage area (i.e. Bankers Box in closet)

- Banking – Checking
- Banking – Savings
- Investments – one general. If you get statements (monthly, quarterly, etc.) start a 3 ring binder and label it
- Credit Cards – one for each credit card
- Paid Debt – holds letters that signify you have paid a debt off
- Utilities – this can hold FPL, Water, Phone and Cable
- Mortgage
- Car – one for each so label specific

- Home Insurance
- Auto Insurance
- Health Insurance
- Life Insurance

- Medical file for each person in family (Donna Med)
- Education file for each person in family (Donna Edu) this will hold any certificates or training items.
- Employment file for each employable person in family (Kelly Work)
- Resumes
- Pets – One for each pet

- Misc
- Receipts
- Home Improvement
- Furniture/Appliances (holds appliances receipts and furniture receipts)
- Vacations

- Will/ Living Trusts
- Important Documents (copies here…originals should be in a safe)

This is just a general list that offers a guide to help get you started. Our goal is to set up a filing system custom made for you and your needs.