

RECORDS CHECKLIST

FOR THE MONTHS OF

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC

COLLECT AND ORGANIZE YOUR HOUSEHOLD'S RECORDS IN 3 STEPS



FIND IT AT HOME OR ONLINE



FILE, SAVE, OR PRINT



CHECK THE BOX

Housing

- Mortgage loan statement
principal, interest, escrow payments
- Purchase or Sale of a property
Closing costs, HUD-1 statement
- Rent
- Real Estate or Property Taxes
- HOA or Condo Fees
- Maintenance and repairs
plumbing, gutters, landscaping, construction jobs
- Household operations
moving fees, storage, security

Utilities

- Telephone/Cell phone bill
- Cable/Satellite TV bill
- Internet bill
- Electricity/Natural gas bill
- Water/Sewer bill

Vehicles

- Bill of sale or lease agreement
new, used, or leased cars, boats, campers, motorcycles
- Financing agreements
- Licensing, registration, and inspection fees and property taxes

Insurance

- Homeowner's/Renter's insurance statement
- Health insurance statements
- Vehicle insurance statement
- Life insurance statements
- Other insurance
long term care, supplementary health, pet insurance, umbrella policies, flood insurance

Medical Care

- Out-of-pocket payments
copayments, coinsurance, reimbursable expenses
- Doctor's appointments, dental visits, eye exams
- Lab tests, x-rays, hospital stays
- Adult care
nursing or convalescent homes, daycare
- Eye glasses and hearing aids
- Rental equipment
- Prescriptions

Remember to get all...

- Paystubs
- Checkbook registers
- Credit Card statements
- Bank statements