

# 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