

# MANAGING YOUR FAMILY

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Keeping Track  
of Important Documents

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A guide by  safelyfiled

What's an important document? It's the one you need—right now. You need and use some of them every day, like your driver's license or credit cards, and they're easy to find because they're always with you. Unless you lose them, of course.

Other documents aren't important every day. They become important once every 6 months, every year, or only once a decade or so. And when you need them, you really need them. They are the ones that you can spend hours looking for, because you know you have them, but you just can't remember where you put them.

SafelyFiled can help you keep these documents organized so they're available when you need them.

Here's a checklist of some of the documents you may want to keep track of. Print this list out. After you've uploaded the documents on the checklist and set the location of the original, check them off the list.

## Documents about you

These identify you and your family members. Keeping copies of them and recording the location of the originals in SafelyFiled may reduce hunting through the filing cabinet later. If the original item gets lost, having a copy of the information will make it much easier to get new ones.

- Birth Certificates
- Social Security Cards
- Driver's Licenses
- State Issued ID cards
- Student IDs
- Passports
- Death Certificates
- Employer ID and passes (unless not permitted)
- Religion-related certificates (baptisms, etc.)
- Military records
- Certificate of Naturalization
- Certificate of Citizenship / Green card
- Marriage Certificate
- Civil Union Documents
- Divorce Decrees
- Child Custody Decrees and Agreements
- Passwords

*You probably have an online identity and many digital assets, like music, your email and social network accounts. These are locked up with a password and if something happens to you, you may want a family member to have access to your accounts. You can store all of your passwords in SafelyFiled.*

## Home (and Student Housing)

You have to live somewhere, and your domicile (either owned or rented) has associated documentation.

- ❑ Deed or lease agreement
- ❑ Property Trust Documents
- ❑ Listing or landlord advertising materials
- ❑ Before and after move in pictures  
*Especially for student housing*
- ❑ Mortgages and related information
- ❑ Title Insurance policy
- ❑ Plat of survey
- ❑ Restrictive covenants (if any)
- ❑ Homeowners Association documents for a condo, co op or club
- ❑ Homeowners or renters insurance policies  
*Usually these automatically renew, so you might want to set a reminder in case you want to get a competing quote.*
- ❑ Pictures of items in your house  
*In the event that your home is damaged, a picture can help you remember what was there originally.*
- ❑ Copies of appraisals for valuable items like jewelry  
*Without an appraisal, it can be difficult to prove to the insurance company that Aunt Rose's antique brooch was really worth \$6,000.*
- ❑ Home improvement documentation (bills, receipts, plans, even paint colors, etc.)  
*Upload copies so you can remember what has been done.*
- ❑ Contact information for builders, plumbers, roofers, etc.
- ❑ Property tax forms  
*Again you can set a reminder in SafelyFiled if your property taxes are paid in installments throughout the year.*
- ❑ Pictures of holiday decorations  
*So you don't have to start from scratch next year.*

## Taxes

Taxes are another reality that results in documents to track.

- ❑ Copies of tax returns.

*Share access to your Taxes folder in SafelyFiled with your tax accountant, and she might even upload your tax return for you.*

- ❑ Copies of charitable donation receipts

- ❑ Copies of W2s, 1099's and other tax documents

*Many organizations provide these to you electronically. Take advantage of that and upload them to SafelyFiled.*

- ❑ Receipts for deductions (business expenses, mortgage interest, medical expenses, etc.)

- ❑ Copies of all other documentation to support your tax returns

## Financial

You almost certainly have money stored at a bank or invested in a mutual fund. Keeping track of how your household's money flows and where it is stashed is essential. Performing an annual review of your asset allocation is good for your financial well-being.

- ❑ Year-end financial statements

from banks, mutual funds, brokerage accounts, etc.

*You don't need to keep every monthly bank or brokerage statement, but gathering up the end of year statements gives you some historical perspective.*

- ❑ Copies of old passbooks

*So you don't forget about any dormant accounts.*

- ❑ Snapshots of your bookkeeping system

*This can be backups from accounting software like Quicken or Microsoft Money, or a backup of the spreadsheet you use to track your bank account balance. If you ever mess up your accounting, going back to the last known accurate statement can be quite helpful.*

- ❑ Credit Card information

*Somewhere make a list of your credit card account numbers and phone numbers. If you ever lose your credit cards, this list will be essential to quickly shutting down your accounts. You can store this list in SafelyFiled or store the location of this list in SafelyFiled.*

## Health

Healthcare is a big part of managing a family. At some points, such as when your children are young or when dealing with chronic health conditions, keeping records of immunizations, medical procedures, and medicines can get confusing. As health technology improves, the delivery system becomes more complex and so the amount of information to track increases.

### ❑ Health insurance cards

*Take pictures and store in SafelyFiled. For most purposes, a picture of your health insurance card is sufficient.*

### ❑ Doctor information

*In large families or even for an individual with a health issue, the number of doctors can be hard to keep track of. Summarize your family's doctor information in the table below. Or, if it's easier, just set up medical folder in SafelyFiled and a sub folder for each family member and upload a copy of a bill from each doctor. The bill should have the doctor's name, your patient number and the date of at least one visit. This might be enough to jog your memory.*

Doctor Name	Purpose	Contact Information

**Information about current prescriptions**

*As the number of doctors increases, the number of prescriptions also increases. One doctor may or may not be aware of the prescriptions that you have received from another doctor. It is best if you have the information with you to share with physicians and pharmacists to avoid bad drug combinations. You can fill out a list like the one below, or if you want, simply upload a copy of each pharmacy receipt. And don't forget your vitamins and other supplements.*

Medicine	From Doctor	For

**Immunization records**

*Useful for filling out health forms for activities for your kids.*

**Copies of examination reports (particularly for kids)**

*The yearly health examination will be requested for health forms for summer camp and scout activities, so keeping a copy handy is a good idea. You can set reminders to ensure that you remember to set the appointment for next year's exam.*

**Copies of paperwork about specific procedures**

*In 3 years, it may be helpful to remember the name of the doctor who took out your appendix and the exact date of the procedure.*

**Prescription information for elderly parents**



## Kids

Children specifically come with many forms.

- ❑ Permission/health forms, e.g., Boy Scouts, school athletics  
*Save it. It was a hassle to fill out. You might be able to use it again.*
- ❑ Copies of test results, e.g. AP tests, ACTs, SATs
- ❑ Copies of awards
- ❑ Anything that might help with a college application (You may want to start this in Junior High)  
*Records of community service, a particularly insightful paper, teacher recommendations, newspaper articles, foreign trips, college application essays, etc.*
- ❑ Embarrassing photos  
*Just in case you need them for a wedding presentation or to share with your grandkids.*

## Warranties and coupons

- ❑ Warranties and receipts  
*Set a reminder when the warranty expires if you want to consider adding an extended warranty on the item.*
- ❑ Coupons  
*You receive some coupons via email or Facebook these days. Store them in SafelyFiled and set a reminder before it expires, so you are more likely to use it.*

## Automobiles

- ❑ Car titles
- ❑ Car registration
- ❑ Auto loan notes and documentation
- ❑ Insurance policies

*Set a reminder when it needs to be renewed.*

- ❑ Insurance cards

*Eventually an electronic copy may be sufficient to prove adequate insurance. Then you don't need to worry about updating the insurance card in your car every six months.*