

Organizing Financial Paperwork



Guide to Colored Tabs

- | | |
|------------|---------------------------------------|
| 1. Clear | Personal Directory |
| 2. Green | Professional Directory |
| 3. Blue | Financial Information |
| 4. Yellow | Goals List |
| 5. Orange | Personal Property Inventory |
| 6. Green | Net Worth, Budget, Special Expenses |
| 7. Yellow | Loan Papers |
| 8. Blue | Income Tax Information & Documents |
| 9. Clear | Rental or Lease Agreements |
| 10. Green | Insurance Policies |
| 11. Blue | Social Security Benefits Statements |
| 12. Yellow | Pension/Retirement Benefit Statements |
| 13. Orange | Birth Cert., Immunization, SS Cards |
| 14. Green | Credit Report |
| 15. Yellow | Paycheck Stubs |



Personal Directory



Professional Directory



Financial Information



Goals List



Personal Property Inventory



*Net Worth
Statement/Budget/
Special Expenses*



Loan Papers



*Income Tax
Information &
Documents*



Rental or Lease Agreements



Insurance Policies



Social Security Benefits Statements



Pension/ Retirement Benefits Statements



*Birth Certificates,
Immunization
Records, SS Cards*



Credit Report



Pay Check Stubs

**Personal
Directory**

**Professional
Directory**

**Financial
Information**

Goals List

**Personal
Property
Inventory**

**Net Worth
Statement/
Budget/
Special
Expenses**

Loan Papers

**Income Tax
Information &
Documents**

**Rental or
Lease
Agreements**

**Insurance
Policies**

**Social
Security
Benefits
Statement**

**Pension/
Retirement
Benefits
Statements**

**Birth
Certificates,
Immunization
Records,
Social
Security
Cards**

Credit Report

**Paycheck
Stubs**