

Record Keeping Work Sheet

Take some time to answer these questions about your very important papers. Answer “Yes” or “No” for each one.

- ___ 1. Can you instantly locate last year’s income tax return?
- ___ 2. Do you know where your original Social Security card is?
- ___ 3. Do you have receipts and cancelled checks to document last year’s tax return?
- ___ 4. Do you have the account numbers, addresses and phone numbers of all the credit cards in your wallet written down somewhere?
- ___ 5. Could a nonfamily member locate important information about what to do in case of an emergency or in the event of your death?
- ___ 6. Do you know where to find the insurance policy for your car?
- ___ 7. Do you know where you keep the warranties for your home appliances?
- ___ 8. If your house and its contents burned, could you provide your insurance agent with an accurate list of all the household goods to settle your claim? How about proof of purchase for costly items?

If you answered “no” to two or more of these questions, it’s time to make some changes in your record-keeping habits now!