

## **PERSONAL/HOME INFO ORGANIZATION SYSTEM**

## **FOLDER**

Sub-Folder

### **PERSONAL DOCUMENTATION**

- Social Security Cards
- Driver's License
- Passport
- Birth Certificates / Adoption Documentation
- Marriage Certificate
- Divorce Decrees

### **MORTGAGE/LEASE Documents**

**VEHICLES:** Sub-Folder for each vehicle

**BANK ACCOUNTS:** Sub-Folder for each account detailing ownership and beneficiaries

Safe Deposit Box: Location of Keys

### **INSURANCE**

- Property Insurance
- Life Insurance: detailing ownership and beneficiaries
- Health Insurance / Long-Term Care Policies

### **INVESTMENT ACCOUNTS:**

Sub-Folder for each account detailing account type and beneficiaries

### **DEBT**

- Major Credit Cards
- Retail/Store Credit Cards
- Student Debt
- Personal Loans
- Medical Debt

### **INCOME**

- Current Employment
- Side Hustle/ Other Business Income
- Social Security
- Retirement Income
- Other Income

### **ASSETS**

- Home Inventory
- Investment/Rental Properties
- Second/Vacation Homes
- Land/ Machinery
- Valuable Property: jewelry, antiques, instruments, artwork
- Licensed or Registered Property: Firearms, weapons, equipment
- Contents of a Storage Unit
- Safe Deposit Box Contents
- Sentimental Items
- Other Tangible Assets

**PEOPLE/KEY CONTACTS/FAMILY & FRIENDS**

- Dependents
- Professional Service Providers
- Pets
- Ancestry
- Friends

**EDUCATION & CAREER**

- Transcripts/Certifications
- Diplomas
- Past Employment
- Military Service

**HEALTH**

- Current Medical
- Past Medical
- Medicare / Medicaid

**COMMUNITIES: LOGIN/PASSWORD JOURNAL**

- Utilities:

  - Recurring Bills: Mortgage, Gas, Electric, Water, Phone, Cable, Streaming, Credit Card

  - Auto Pay Bills: Mortgage, Gas, Electric, Water, Phone, Cable, Streaming, Credit Card (Login credentials, Associated E-mail Account and Linked Payment Account Info)

- Post Office: Box Numbers and Key/Combination

- Charities/Donations

  - Online Accounts
  - Subscriptions & Memberships
  - Social Media
  - Other Online Accounts

**LEGAL & TAX**

- Taxes: Prior Tax Returns, Property Tax Statements
- Legal

**ESTATE DOCUMENTS**

- Will/Trust
- Medical Directives
- Financial Power of Attorney
- Guardianships
- End of Life Ceremonies

**Zipper Bag to include keys or copies of keys needed for access to property**

## **FARM/RANCH BUSINESS INFO ORGANIZATION SYSTEM**

## **FOLDER**

Sub-Folder

### **FARM/RANCH BUSINESS STRUCTURE DOCUMENTS**

#### **FARM/RANCH FINANCIAL ACCOUNTS**

- Farm/Ranch Checking Accounts
- Farm/Ranch Savings Accounts
- Farm/Ranch Operating Note Documentation

#### **USDA-Farm Service Agency**

- Government Program Enrollment, Certification Records and Program Payments

#### **USDA-Natural Resources Conservation Service**

- Conservation Plan Agreements and Documentation

### **TEXAS DEPARTMENT OF AGRICULTURE PROGRAMS**

#### **AGRICULTURAL COOPERATIVE DOCUMENTS**

#### **PRIOR YEAR FARM/RANCH BUSINESS TAX DOCUMENTS**

- Schedule F
- Depreciation Schedules

#### **FARM/RANCH REAL ESTATE DOCUMENTS**

- Deeds (hard copies or digital) – including legal description of properties
- County Tax Appraisal Statements/Valuations
- Leases – Surface Use Agreements
- Easements
- Surveys/Aerial Maps
- Hunting Lease Agreements
- Mineral Rights Lease Agreements
- Air Rights / Other Surface Use Lease Agreements

#### **CROP INVENTORY RECORDS**

#### **LIVESTOCK INVENTORY RECORDS**

#### **MACHINERY & EQUIPMENT INVENTORY**

- Titles
- Financing Documentation

#### **FARM/RANCH VEHICLE INVENTORY**

- Titles
- Financing Documentation

#### **FARM/RANCH LABOR RECORDS**

#### **ROYALTY DOCUMENTS**

- Oil/Gas Royalties
- Wind Energy Royalties