

Simplified by Bobbie
Your Life: From CoMpLiCaTeD to Simplified

[Sample File Index](#)

Life Management Files

Automotive

Sale & Warranty Info
Service Records
Insurance
AAA

Bills

Folder for Each Bill
Credit Card
Store Credit Cards

Finances

Checking Account
Savings Account
Investments
Retirement
Social Security
Current Year Tax Docs
Credit Score

Home

Mortgage
HELOC
Insurance
Maintenance
Landscaping
Pool
Pest Control

Medical

Health & Wellness Info
Medical Records
Insurance
EOB's
Paid Medical Bills

Misc Medical

Vision
Specialists
OB/GYN
Chiropractor
Mental Health

Dental

Dental Records
Insurance
EOB's
Paid Medical Bills

Life Reference

Life Insurance
Will & POA Copies
Safe Deposit Box Contents
Property Inventory
Death Information

Action Files

Call / Contact
Call Waiting Reply
Computer Entry
Children's Good Work
Discuss
Extracurricular Activities
File
Hold for Future
Pay
Project
Read
Sign
Special Events
Take Somewhere
Upcoming Meeting / Trip
Write / RSVP

Reference Files

Articles
Book Information
Church
Diet
Entertainment
Education Records
Gardening / Plants
Gift Ideas
Hobbies
Holidays
Home Decorating
Humor
Maps / Direction
Party Records
Quotes
Recreation
Resume
Shopping
Special Interests
Subscriptions / Memberships
Travel
Warranties (Misc.)

Note: Each Life Management File category should be labeled on a hanging file - all left aligned. Each sub-category should be on a labeled 1/3 cut file folder.

Example:

Finances (hanging file tab)
 Checking Account (file folder)