

A Home File

1. Personal and Employment Records

- Current CV
- Birth certificates
- NSSF number
- Employment Contract

2. Money Management Records

- Current budget
- Recent personal financial statements (balance sheet, income statement)
- List of financial goals

3. Tax Records

- Pay slips
- Past Income tax returns
- Past Income and Liability Declaration forms

4. Financial Services Records

- Bank statements
- Checkbook,
- Savings statements

5. Credit Records

- List of Credit card account numbers and telephone numbers of issuers
- Receipts, monthly statements

6. Home Purchases & Auto Records

- Warranties
- Receipts for major purchases
- Owner's manuals for major appliances
- vehicle service and repair records
- vehicle registration and owner's manual

7. Housing Records

- Lease agreements
- Property tax records
- Home repair, home renovation receipts

8. Insurance Records

- Original insurance policies
- List of insurance premium amounts and due dates
- Medical information
- Claim reports

9. Investment Records

- Records of stock, bonds, unit trust purchases and sales
- Brokerage statements
- Dividend records
- Company annual reports

10. Estate Planning and Retirement Records

- Will
- Pension plan information
- Social security information
- Trust agreements