

The Organized Financial Life: My Shopping Checklist



What items do you need to organize your financial life and keep it running smoothly? Assess your needs and get helpful tips with this grab-and-go list you can take right to the store.

CATEGORY	WHAT	WHY	TIP
Day-to-Day	<input type="checkbox"/> Security-tinted business envelopes	Protect information sent by mail.	
	<input type="checkbox"/> Black/blue pens	Preferred ink color for financial tasks such as check endorsing.	Look for so-called “ security pens ” with specially formulated ink to protect against check fraud.
	<input type="checkbox"/> Calculator	Balance accounts and maintain records with the utmost accuracy.	
	<input type="checkbox"/> Postage stamps	Pay bills by mail immediately.	
	<input type="checkbox"/> In/out system	Keep track of bills to pay and paid. Ideas include wall-mounted paper/periodical sorter or a desktop vertical file	
	<input type="checkbox"/> Small notebook	Record confidential information like logins and passwords in case of an emergency, or use as a guide so a family member or executor can know where everything is. Keep locked up in your personal safe or another secure spot.	Don't keep login and password information together with listings of account numbers and institutions. Store listings in two distinctly secure places.
	<input type="checkbox"/> Wall calendar	At-a-glance resource for paydays and payment due dates.	
	<input type="checkbox"/> Paper-based or electronic spreadsheet system	Use to set and maintain budget, or to keep a running record of assets/expenses.	Electronic record-keeping may be intimidating, but the benefits are worth it. Not only is it easier to back up information, some spreadsheet programs will do calculating for you automatically.
Storage	<input type="checkbox"/> Large clasp envelopes	Secure holder for easily lost paperwork such as receipts and cancelled checks.	
	<input type="checkbox"/> Letter-size files and hanging folders	Sort and store paperwork.	
	<input type="checkbox"/> File storage system	Keep information organized and at your fingertips.	No room for another piece of furniture? Try a file cart that can be rolled into a closet, a file tote you can take anywhere, a space-saving expanding file or a file box you can store on your desktop.

CATEGORY	WHAT	WHY	TIP
	___ Storage boxes	Organize records, receipts, bills and more. For paperwork you need easy access to, choose small, colorful boxes that add to decor. Look for sturdy plastic totes and corrugated boxes for paperwork that can be put away for storage.	
Safety	___ Shredder	Safely dispose of paperwork containing personal information.	
	___ Security safe	Protect important documents and items like birth certificates, wills and safe-deposit keys from theft or natural disaster.	Don't forget to let at least one trusted person know how to access the safe in your absence.
	___ Internet security software	Safeguard information from online threats such as hackers and phishing.	
	___ Computer back-up system	Whether you use an external hard drive , a portable USB Flash drive or simple CD storage , backing up your electronic files is a must.	To determine how often you should be backing up your computer data, consider frequency of use as well as type of data (financial spreadsheets vs. family photos).
Specialty	___ Financial organization kit (such as HOMEFILE®)	Get a jump-start on organization inclusive kit.	Save time and effort by purchasing specialized kits or software for filing, household budgeting, taxes and more.
	___ Home and life inventory kits (like Valuables.doc™ and Life.doc®)	Create a catalog of your most valuable possessions. Choose from paper-based kits or electronic software .	
	___ Tax organization kit (such as the Captio TaxCase™)	Organize your tax information all-year-round in one specially- designated system.	

Want to bring an element of design (or personality) to your organization?

Get inspired by these stores and sites:

- Cavallini.com
- Design Public
- Paperclippy.com
- Target
- CB2
- Design Within Reach
- Russelandhazel.com
- The Container Store
- Kate's Paperie
- SeeJaneWork.com