



Digital Filing System Organizer

Create a Personal System for Organizing Financial Records

Getting Started

Use this tool to build your personalized digital filing system. Check off the documents you currently have, and identify which ones you need to obtain. Each document shows its recommended retention period.

Your Organization Progress

Documents checked: **0 of 24**

%



Tax Documents

☐

W-2 Forms

7 years

☐

1099 Forms

7 years

☐

Tax Returns (Federal & State)

7 years

☐

Receipts for Tax Deductions

7 years



Employment Records

- ☐ Employment Contracts Permanent
- ☐ Pay Stubs (Current Year) 1 year
- ☐ Retirement Account Statements Permanent
- ☐ Benefits Documentation Permanent



Banking & Financial

- ☐ Bank Statements 1 year
- ☐ Credit Card Statements 1 year
- ☐ Investment Account Statements Permanent
- ☐ Loan Documents 3 years



Insurance Documents

- ☐ Life Insurance Policies **Permanent**
- ☐ Health Insurance Records **3 years**
- ☐ Auto Insurance Policies **3 years**
- ☐ Property Insurance (Home/Renters) **Permanent**



Property & Assets

- ☐ Property Deeds **Permanent**
- ☐ Vehicle Titles **Permanent**
- ☐ Major Purchase Receipts **Permanent**
- ☐ Home Improvement Receipts **3 years**



Personal Identification



Birth Certificate

Permanent



Social Security Card

Permanent



Passport

Permanent



Marriage/Divorce Certificates

Permanent



Organization Tips

- **Use cloud storage:** Keep digital copies in secure cloud storage (Google Drive, Dropbox, OneDrive)
- **Create a folder structure:** Organize by year and category for easy retrieval
- **Set calendar reminders:** Review and purge old documents annually
- **Secure sensitive documents:** Use password protection for files with personal information
- **Backup important files:** Keep copies in multiple locations (cloud + external hard drive)