

File Categories

Having a system to organize your paperwork will quickly help you find important information. Being able to quickly access the information improves your decision-making abilities, relieves stress, and encourages decisions to be made in a timely manner. To help you get started, here is a sample list of how to organize your files. Feel free to make adjustments that are best for your family.

Financial: Your Finances

- Spending Plan
 - Your Budget
 - Money Saving Tips
- Income
 - Pay Stubs
 - Alimony
 - Child Support
 - Public and Private Cash Assistance
 - Interest Income
 - Investment Income
 - Dividends
 - Rental Income
 - Cash Gifts
- Checking Account
- Debt
 - Credit Cards
 - Mortgage Loans
 - Auto Loans
 - School Loans
 - Personal Loans
- Personal Savings
 - Savings Account
 - Investments
- Living Expenses
 - Utilities
 - Receipts
 - Warranties
- Disability-Related Expenses
- Tax Returns
 - Tax Saving Tips
- Source of Funds (examples: Grants, Studies, Foundations)
- Retirement
 - Employer Plans
 - IRA
 - Investments
 - Social Security
- Estate Planning and Will
 - Special needs trust
 - Guardianship

Financial: Your Child's Finances

- Individual Development Account (IDA)
- Employment Income
- Checking or Savings Accounts

Financial: Health Care Plans

- Government Health Care Assistance
 - Medicaid/Medicaid Waiver
 - SSI
 - SSDI
 - Medicare
- Private Insurance
 - Medical, Hospitalization, Dental, Vision
 - Life
 - Disability
 - Long-Term Care
- Employer-Provided Health Care Plan

Education

- Individual Education Plan (IEP)
- Assistive Technology and Accommodations
- Transition Planning
- Post-Secondary Education
 - Selecting a School
 - Paying for School: Scholarships, Grants, Work Study, Government Loans

Support Services

- Person Centered Plan
- Annual Service Plans (from support agencies)
- Information about Support Agencies and Organizations (that serve your child)

Employment (your child's)

Housing (your child's)

Disability-Specific Information

Sibling Issues

Legislation