

The Document Organizer

The purpose of the Document Organizer is to gather and organize all your important papers in one place. At this time, please assemble all your important documents. If you discover you are missing any, try to obtain them promptly. It is important to have these files and document organized so they can be easily retrieved.

Use this as a check list to help you gather your papers for the Document Organizer:

- | | |
|--|--|
| <input type="checkbox"/> Birth Certificates | <input type="checkbox"/> Marriage Certificates |
| <input type="checkbox"/> Military Discharges | <input type="checkbox"/> Wills |
| <input type="checkbox"/> Trusts | <input type="checkbox"/> Debt Instruments |
| <input type="checkbox"/> Power of Attorney | <input type="checkbox"/> Death Certificates |
| <input type="checkbox"/> Citizenship Papers | <input type="checkbox"/> Deeds |
| <input type="checkbox"/> Mortgages | <input type="checkbox"/> Leases |
| <input type="checkbox"/> Business Arrangements | <input type="checkbox"/> Retirement Papers |
| <input type="checkbox"/> Automobile Titles | <input type="checkbox"/> Insurance Policies |
| <input type="checkbox"/> Divorce Decrees | <input type="checkbox"/> Income Tax Returns |

There are three basic ways to organize your documents:

1. Paper Files

Once you determine the documents you want to place in the Organizer, decide how you wish to store them: in a three-ring binder, an accordion file folder, a portable file box, or a file cabinet. The *Set Your House in Order* workbook is three-hole punched and perforated for your convenience if you choose to use a three-ring binder for storage.

Originals of some documents, such as wills, trusts, deeds, and life insurance policies, should be stored in a secure place, such as a safe-deposit box. Photocopy the originals of these documents, and place the copies in your Document Organizer.

2. Electronic Files

You may fill out any of the forms in this book electronically. Download them for free by visiting www.compass1.org and clicking on “Small Group Studies,” then *Set Your House in Order*. You can add documents to your electronic file by scanning and saving them to your electronic Document Organizer

File. Please back up these electronic files, and make sure your spouse and loved ones know how to access them.

3. Online Files

A third option is to back up your electronic and scanned documents online. When you use this method, you will be able to access them from any computer. Another benefit of an online file is you can have it password-protected. This enables you to give password access to anyone who needs it. Go to www.compass1.org and click on Small Group Studies, then *Set Your House in Order*-Student and Facilitator Tools for recommendations for Online Files.