

Creating Your Box of Business

Staying Organized with Your BOB



YOUR "BOX OF BUSINESS" (OR BOB) HOLDS ALL THE IMPORTANT DOCUMENTS FOR YOU AND YOUR FAMILY IN ONE PLACE.

This checklist will give you an idea of which records you should have in your BOB, and how far back they should go.

Everyone	
DOCUMENTS	TIME KEPT
Bank Statements	1 yr
Birth Certificate(s)	forever
Immunization (vaccine) records for children	forever
Insurance policies and bills	3 yrs
Medical bill	1 yr
Medical records (test results, etc.)	forever
Pay stubs	1 yr
Receipts/warranties for big purchases	3 yrs
School records for children: <ul style="list-style-type: none"> • Enrollment records • Report cards (keep for one year) • Test scores • Communications between you and the school 	forever
Social Security card	forever
Tax returns	7 yrs
Utility bills	6 mos
W-2 and 1099 forms	3 yrs

Optional	
DOCUMENTS	TIME KEPT
Apartment lease/rental agreement	until you move (6 months afterwards)
Car lease agreement	3 yrs
Car title	forever
Child care payment receipts	1 yr
Child support payment records	3 yrs
Credit card bills	6 mos
Death certificate(s)	forever
Divorce certificate or divorce decree	forever
GED/high school diploma	forever
Marriage certificate	forever
Proof of citizenship or legal residency	forever
Public benefits statements/forms	forever
Rent receipts	1 yr
School records for children: <ul style="list-style-type: none"> • Transcript • Education evaluations • Individualized Education Program (IEP) or 504 plan • Discipline records 	forever
Voter registration card	forever
Wills	forever

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Documents that are hard to replace



These documents are very difficult to replace. You should keep them in a **safe place** where you can easily find them. But, unlike the rest of your BOB, you should only take them out of your house if you absolutely need to.

Birth certificates

Social Security cards

Marriage certificates

Death certificates

Car titles

Green cards

If you need **vital records** to qualify for a service, it's critical for you to check directly with the agency or organization to see which records they require. You don't want to show up to an appointment only to find you're missing one important piece of paper.

Eligibility documents usually fall into a few categories:

PROOF OF IDENTITY:

- Driver's license or state/tribal ID
- Passport
- Birth certificate or other identification.

Check with the agency you are applying to.

PROOF OF RESIDENCY:

- Apartment lease agreement
- Rent receipt
- Mortgage statement
- Utility bills

Check with the agency you are applying to.

PROOF OF INCOME:

- Recent pay stubs
- Benefits statements
- Copies of child support checks or other records

Check with the agency you are applying to.

PROOF OF EXPENSE:

- Child care payments
- Medical bills
- Records of child support payments
- Rent receipts or mortgage payments
- Utility bills

Check with the agency you are applying to.