

Tools needed for paper organizing process

Shredder

Recycle bin

2 “Keep” piles bins/baskets

Photo boxes

Steps to organize paper

- Gather all loose paper in the house (leave files alone for later)
- Decide what space the “keep” pile is going in and how you will organize that space (use the wall with files or on counter upright files or actual baskets/bins)
- Sit down and begin (don’t spend a lot of time reminiscing)
- Divide paper into:

Immediate Action Bin

bills, invite responses, school forms

Short-term Action Bin

receipts, school year info, monthly dues,
deposits/ATM slips

Long-Term Action- file cabinet

Keep 1-3 yrs.: paychecks

Mortgage statements

Charitable contributions

Insurance records

Income related documents

7 years:

State and Federal taxes

W-2 and 1099

Receipts used as tax deductions

Cancelled checks

Mileage reports

Real estate records

Steps to Staying organized

Create a Command Center

- Calendar
- Chalk board-message center
- Immediate action bins
- Short-term action bins
- Place for receipts

Go through mail immediately-as you're walking into the house and put in appropriate locations-discard junk mail

Rip out articles from magazines and newspapers and discard the rest

Go paperless

Scan important documents and photos into computer-remember to back-up computer