



New File Checklist

Here's a quick checklist on how to organize and set-up your paper files. And be sure to visit my YouTube page for the full video!
<https://youtu.be/fRvRc6MO98Q>

1. Color coding and keeping tabs in set places so that they're quickly recognized.



This easily identifies categories and makes filing future paperwork a breeze! Bonus benefit: It's easy to add to and the streamlined look will stay intact.

Check out FreedomFiler.com I'm not endorsed by them – but I DO suggest you take a look at their simple file structure as a baseline for setting up YOUR files.

2. Sort your papers into categories... (Remember, you don't need to keep every paper!)
Make use of on-line records whenever possible. Sample Categories:

Permanent records

- Birth and death certificates
- Social security cards
- Pension plan documents
- ID cards and passports
- Marriage license

If you're not sure what documents you should keep and for how long, download my Archival Cheat Sheet from the TIPS & FREEBIES section at CallClutterFairy.com

Financial records:

If you have 2 bank accounts and 6 credit cards... then you should have 8 files! Each account should have it's own file, and the documents would then be filed in date order. Purge on a regular unless you need them for your taxes!



New File Checklist

Medical:

Medical insurance, specific doctors, lab results, medication files... etc. Again, Purge on a regular unless you need them for your taxes!

Taxes:

Our tax files are really important, but this section is only for the current year's taxes...

Create 12 monthly tax files (Jan-Dec) for your receipts and documents. This is the biggest tip for helping with your paper clutter! As those important papers have a set home!

When it's time to do your taxes... you're already to go! All of your documents and papers are already organized and sorted!

Once that year is done, keep them in a large envelope (or box, if you have lots of papers) and keep those in a separate drawer or closet clearly marked. You don't usually need constant access to past tax years, so keep them out of your prime real-estate space! Be sure to check the Archival Cheat Sheet link below for how long you need to keep tax documents.

Memory items:

This is the broad "fun" section.... cards, letters, vacation brochures, school related papers, etc... But be careful that this doesn't become a catch-all! If your files are overflowing... it's time to break it down to a possible new category... or purge! And don't be afraid to scan those documents for a digital copy instead!

That's it!!! Now that you've mastered this technique you can use it for setting up your computer files! Set the timer for an amount of time that is comfortable for YOU, and whittle that pile of paperwork down... one session at a time! You will be amazed at how fast it goes by!