

Organizing Paperwork Cheat Sheet

SORT ALL OF THE PAPERWORK BEFORE ORGANIZING

- NEWSPAPERS
- BILLS
- FLYERS
- TAKEOUT MENUS
- MAIL
- OTHER

PERSONALIZE THE SORTED PAPERWORK

- LIMIT WHAT YOU KEEP BY ONLY KEEPING IMPORTANT ITEMS
- CLIP PHONE NUMBERS
- KEEP RECIPES YOU LIKE

ORGANIZE THE PAPERWORK

- GRAB SUPPLIES TO ORGANIZE THE PAPERWORK
- 3 RING BINDER OR PLASTIC TUB
- CLEAR PLASTIC POCKETS OR FOLDERS
- DIVIDERS
- 3 HOLE PUNCH (IF APPLICABLE)
- LABEL MAKER
- SHREDDER

LABEL & ARRANGE THE PAPERWORK

- CREATE CATEGORIES
- LABEL FILES
- ORGANIZE ALL THE PAPERWORK

PAPERWORK SYSTEM

- FILE OR TOSS PAPERWORK AS SOON AS IT COMES IN
- KEEP UP WITH THE PAPERWORK
- UPDATE FILING SYSTEM EVERY 3-MONTHS

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ORGANIZE INCOMING MAIL

1. CREATE A DROP ZONE FOR YOUR MAIL

2. CHOOSE FOLDERS THAT MAKE SENSE

(CATEGORIZE YOUR MAIL)

**3. HAVE A RECYCLE BIN READY FOR YOUR
JUNK MAIL**

**4. HAVE A SHREDDER READY TO SHRED
SENSITIVE PAPERS**

**5. GO THROUGH FOLDERS REGULARLY
AND REMOVE OLD PAPERS**

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MAIN CATEGORIES

- UTILITIES
- BANKING
- CREDIT CARDS
- HEALTH
- HOME
- AUTO
- INSURANCE
- RETIREMENT
- TAXES
- HOME MAINTENANCE
- IMPORTANT DOCUMENTS
- WARRANTIES

SUBCATEGORIES

- WATER
- GARBAGE
- ELECTRIC
- PHONES
- INTERNET
- STATEMENTS
- OTHER
- HEALTH BENEFITS
- BILLS
- CREATE A FOLDER FOR EACH CREDIT CARD
- HOA
- PROPERTY TAXES
- MORTGAGE
- OTHER
- LOANS
- TITLE
- CAR MAINTENANCE
- STOCKS
- CURRENT TAXES
- A FOLDER FOR EACH PERSON FOR IMPORTANT INFO