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filing 101

JENNIFER HUMES, THE CLUTTER QUEEN®

A friend recently confessed, "I have boxes and boxes of paper I don't know what to do with. I pay bills, mark paid on the bill, then toss into a box along with all the other papers. Then when I go to find a certain document, I can't find it." Does this sound familiar? You are not alone. We all missed the class that teaches us what to keep and what to throw out.

permanent files

Start with the most important documents such as personal identification documents.

- Birth Certificate
- Employment Records (including dates, salaries and contact info)
- Medical Records
- Passport (Current)
- Social Security Card & Statement
- School Records (Diploma & Transcripts)
- Wills

current files

Current files are those you need to have access to on a regular basis. Schedule time to purge paperwork you no longer need, perhaps during tax season when you are already organizing.

- Auto/Car (Lease or Title)
- Bank
- Children
- Credit Cards
- Insurance
- Investments

current files cont'd

Home (Deed, Lease or Mortgage)
Tax Returns
Travel
Utilities
Warranties

This is not an exhaustive list of current files. Be sure to check with your Certified Public Accountant (CPA) or investment professional for more information or tax advice.

action files

Keep action items toward the front of your files for quick access.

Bills to Pay
To Do
To File
To Read

labels

Clearly label files with a label maker or software program that will enable you to locate files easily.

filing software, books and resources

There are several software programs and books available to help you find the right filing system. Some customization may still be necessary.

Smead Viewable Color Labeling System, www.smead.com

Smead Arrange File Organization System, www.smead.com

FreedomFiler Self-Purging File System, www.freedomfiler.com

Find Every File, www.findeveryfile.com

Pendaflex and Oxford Templates, www.pendaflex.com

Taming the Paper Tiger by Barbara Hemphill

filing supplies

Choose a filing box or cabinet that will fit within your space. Use color-coded files to distinguish between the various categories. Find more filing tips online at www.pendaflex.com and join the "I Hate Filing" club at www.ihatefiling.com.

shred and recycle

Invest in a good shredder to deter identity theft. Most paper is recyclable, so recycle whenever possible.

Any system will take time to set up initially. Committing to get your paper in order is half the battle. Start small by tackling one file a day or set a timer for 15 minutes. Soon you will have a filing system that is easy to maintain and eliminates paper stress. 🗑️



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