

Live A Happier, Healthier, More Comfortably Organized Life

Organizing paper seems to be the most tedious & daunting task that my clients deal with.

Do you agree? I certainly do.

Hey, I know it's a pain to deal with all those papers entering your home at high speeds. You didn't get all these papers overnight, so it's not going to magically go away overnight. But I promise we can get your kitchen table (or wherever you stash papers) cleared off again and we can get you back a real desk to work on! I am here to help. So to start this process (don't worry, I will be with you every step of the way), just use this handy guide to take the most crucial first step to organizing your paper clutter. I know it's going to be a great first step. I know how wonderful it can be to love your home, to drive around in your clean, receipt free car, and to know exactly where every important document lives.

Curious what the first step is?

The first step for ANY organizing project is to sort your items. Sounds simple, right? It really is when you have a "sorting plan." Not some wishy washy plan, but a solid one. Below you will find a very detailed list of how to sort your paperwork and the exact directions to make it happen. These instructions come straight from my "How to Organize Your Home Paperwork" Online Guide.

The best news is you don't even have to decide where to start, because I have made the decision for you.

I'll have you gather some items first. Then we'll get to work.

Page 2: Gather Supplies, View Picture

Page 3-5: Detailed Sorting Guide – PRINT these pages for a handy reference

Page 6: Next Steps I Suggest You Take When You Finish Sorting (I added some notes, too)

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Before you begin, gather the following items:

You will need:

- 16 or More Boxes or Containers from Around Your House (1 for each family member, 1 for each piece of Real Estate you own/rent, 14 for other categories listed below)
- Blank Paper & Marker
- Tape
- Paperwork (You don't have to grab ALL of it right now, but definitely sort all of it.)
- Clear Floor or Top of Bed in a Low Traffic Area
- Trash/Shred bags (Only deal with obvious, no-brainer, trash at this time.)
- Frosty Beverage of Your Choice
- Music or Television is Allowed

Got Everything? Great! Take a look at the picture below and then review the detailed categories on the following pages. Once you have reviewed everything, start sorting.

I want you to see what the sorting process may look like. One of my private phone coaching clients sent this picture to me, showing her progress. She kindly gave me permission to use it with my materials. A HUGE thanks to her!



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Use the following list as your sorting guide. Please don't worry about how to set up a file system at this time. I simply want you to focus on touching each piece of paper and sorting it. Sorting is the first step.

Use the paper and marker to create your labels using the following categories below. Next, tape the labels to all your containers. Gather and place your paperwork behind you or on the other side of the room. Grab one bag, box, or handful of paperwork and begin sorting it into the appropriate container. I find that sitting in a comfy chair or on the floor with the containers in a semi-circle, layered in rows, is more convenient for dropping papers into containers. Alternating to a standing position periodically while you work will help prevent your booty from going numb. (I've done this a time or two.;-) Repeat this process until you have all your paperwork sorted.

Banking, Income

- Airline Mileage Statements
- Checking Account Statements
- Savings Account Statements
- Pay Check Stubs, Pay Check Records
- Child Support Payment Records
- Social Security Payment Records
- Unemployment
- Retirement (See Investments for Alternate Category Option)
- If it is a form of income, then the proof goes here.

Credit (Cards, Unsecured Loans)

- Credit Card Statements/New Account Info
- Unsecured Loan Documentation (These are usually smaller loans that do not require you to place a lien against your personal property.)
- Credit Reports

Family – Make a Sorting Box for Each Family Member, Including Pets

- Identifying Records – Copies of Social Security Cards, Birth Certificates
- Genealogy Records (Place with appropriate family member.)
- Medical Records (NOT Expenses)
- Voter Registration Documentation
- Life Insurance – The original could be placed with Legal/In Case of Emergency Documents
- Retirement Information (You may wish to place this in Investments or Income. See Investments for advice on how to choose its location.)
- Resume'
- Education Records
- Certificates of Accomplishments
- Career Documentation
- Hobby Information
- Interesting and Fun Memorabilia
- Jewelry/High Value Receipts
- Firearms Receipts

Live A Happier, Healthier, More Comfortably Organized Life

Investments

- Stocks
- Bonds
- CDs
- Retirement Documents - *These could be sorted into one of three places: 1. With Specific Family Member's Paperwork, 2. With Income/Banking, if benefits are being paid, 3. With Your Investment Records. (Which one feels right to you? Go with your instinct.)*

Legal/In Case of Emergency Paperwork – Original Documents (Copies can be placed behind specific family member's category)

- Adoption Records/Legal Guardianship Records
- Child Support/Custody Legal Agreements (Actual Child Support Check Documents Go In Income Received)
- Divorce Records
- DNR Orders (Do Not Resuscitate)
- Marriage Certificate
- POA (Power of Attorney)
- Will
- Identifying Records - Birth Certificates, IDs, Social Security Cards, Passports
- Life Insurance – A copy can be placed with the specific person's paperwork later.
- In Case of Emergency Quick Reference Packet

Magazines/Books (See Reference/Resource Material Category)

- Magazines
- Books

Manuals

- Manuals of Items that Would Become the Property of the New Homeowner, Should You Ever Sell Your Home (Ex: Water Heater, Appliances, A/C and Heat, Sewage System, etc)
- Furniture – Hutches, Dining, Sofa, Armoires, Office Desk
- Electronics – Cell Phone, Video Camera, Gaming Systems, Printers, Computers
- Outdoor Equipment – Lawn Equipment, Sports Equipment, Grill

Medical (Expense Related) – Place Medical History Records in the Corresponding Family Member's Container

- EOB (Explanation of Benefits from Insurance Company)
- Invoices from Doctors
- Receipts for Prescriptions
- Health Insurance Coverage Policy
- Dental Insurance Coverage Policy
- Vision Insurance Coverage Policy
- If it is a health related medical expense that can possibly be used for tax purposes, then it goes here.

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Photographs

- Photographs

Real Estate Property/Home - Sort each piece of real estate property information into a separate container. Label each box by the "nickname" you give it...beach house, camp house, the condo, Canal St. house, etc.

- Utility Information
- Maintenance Service Provider Info (Pest Control, Landscaping, Heating and Air, etc)
- Remodel/Update Information
- Property Ownership Documentation
- Property Tax Info
- Abstracts
- Titles, Deeds
- Mortgage Agreements
- Flood, Wind, General Home Insurance Policy
- Property Claims
- Expense Receipts for Valuable Furniture, Décor, China
- Inventory of Household Items in Your Possession
- Rental Agreement
- Magazine Subscription Statements

Receipts (High Value Receipts do not go here. Sort all other receipts into this spot for now.)

- Lower Value Receipts
- Clothes Shopping Receipts

Reference or Resource Materials

- Magazines/Books (Sort these into the Books/Magazines Category for now.)
- Articles of Interest
- Newspaper Clippings
- Recipes, Cookbooks
- Basically, if you refer to it for knowledge, instructions, or ideas, then it is a reference or resource...with the exception of manuals.

Tax Related Information

- Gift of Donation Receipts
- Tax Instruction Booklets for Current Year
- Previous Years Tax Documentation
- CPA Information

Live A Happier, Healthier, More Comfortably Organized Life

To-Do Paperwork (See **Setting Up “To-Do”/Action System for Step-by-Step Details on Sorting/Arranging**)

- Bills, To Pay, Give Them My Money
- To Order, Shopping Lists, Coupons
- Phone Numbers, Contact Information to Add to Contact List
- Call, Respond, Follow Up
- Schedule Appointment, RSVP, Give Them My Time
- Give to Someone Else
- Read (Bulky Items – Books/Magazines -- Go In Their Own Box)
- Photographs to Mail or Frame
- If you need to do something with it before you either file it or throw it away, then it probably goes here.

Vehicle Information (Any type of vehicle: Boat, ATV, MoPed, Camper, Tractor Trailer, Kayak, Mountain Bike, Motorcycle, etc.)

- Insurance Policies/Claim Records
- Repair/Maintenance Receipts
- Expense Receipts for Upgrades (Larger Tires, Stereos, GPS, etc)
- Loan Documentation
- Registration Papers
- Title (You may choose to keep the original in a fire safe box or safe deposit box. You may keep a copy of the title here.)
- Department of Motor Vehicle Records/Renewals

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You ROCK! Now that you have completed the most crucial step of getting your paperwork organized, you may be able to take over from here. And if not, then I've got you covered.

I don't want to leave you hanging, so here are the next steps I recommend you take. ('Cuz you didn't do all that work for nothin'!)

The next steps (and some side notes) I recommend are:

1. Set Up Your To-Do Action System - Grab the box containing your "to-do" paperwork. Set up a system that allows you to store and process papers that need your attention.
2. Eliminate Paperwork from Containers of Sorted Paperwork – expired, outdated, no longer need
3. Set Up Your File System - Use the category labeled on boxes as your guide to set up main categories in your file system.
4. Arrange Your Reference/Resource Materials
5. Find a Home for the Stragglers (the "I Don't Know What to Do With It" papers) – be creative
6. Get Into A Comfortable Routine of Keeping Up With Your System – routine, routine, routine

If you liked the simplicity of my guidance for the sorting process and would like for me to guide you step-by-step, with tons of more detail, thru the rest of the paper organizing process, then I would be honored to continue leading the way. Simply [follow this link](#) to learn what else you can expect (you already have a sneak peek in front of you, but I promise there is more!)

Having your home paperwork organized relieves stress, stops you from worrying about forgetting things, enables you to handle your papers faster (I don't preach the "touch it once" rule. You are allowed to touch the paper twice;-) Okay, sometimes you just have to touch the same piece of paper 3 times), frees up your time to do more fun things, and most importantly...it gives you a huge boost of confidence that you can put something away and find it again! Plus, you will feel better because you know that a clean and clutter-free home has that effect on you.

Okay, have another frosty beverage. You deserve it and much more!

Congrats and see you soon,

A handwritten signature in blue ink that reads "Melody". The signature is written in a cursive, flowing style.