



*The Ultimate*  
**PAPERWORK**  
*ORGANIZATION KIT*

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# Welcome

Hello! I'm Corinne, a dedicated mom of five with a passion for making family life both fulfilling and fun. Over the years, I've navigated the challenges of balancing a busy household with healthy eating and joyful living.

I've gathered countless tips and tricks along the way, and I'm excited to share my insights on meal planning and family-friendly cooking with you. My goal is to help you simplify your mealtime routines, engage your children in the kitchen, and create nutritious meals that will delight everyone at your table.



# Home Filing System Guide

Keeping your paperwork organized doesn't have to be overwhelming! With a simple home filing system, you'll always know where to find what you need—no more digging through piles of paper or stressing over lost documents.

## Step 1: Choose Your Filing System

Decide what works best for your space and lifestyle:

**Filing Cabinet** – Best for long-term storage & large amounts of paperwork.

**Portable File Box** – Compact & easy to move, perfect for smaller homes.

**Accordion Folder** – Great for organizing key documents without taking up space.

 Pro Tip: Prefer digital storage?


Scan important documents and organize them in clearly labeled digital folders.

## Step 2: Sort & Declutter Your Paperwork

Before filing, go through your existing papers. Keep what's necessary, shred what's not.

✓ **Keep:** Legal documents, tax records, medical records, warranties, home & car documents.

✂ **Shred:** Expired warranties, old utility bills, outdated receipts (unless tax-related).

 Pro Tip: Use a To-File and To-Shred folder as an in-between step to prevent clutter from piling up.

## Step 3: Set Up Your Filing Categories

### Personal & Legal

- Birth certificates, marriage certificates
- Passports, wills, power of attorney
- Retirement & investment accounts

### Finances & Taxes

- Tax returns (keep for at least 7 years)
- Bank statements, credit card statements
- Loan & mortgage documents


### Household & Auto

- Home purchase/lease paperwork
- Utility bills, home repair records
- Auto insurance, registration, maintenance




### Medical & Insurance


- Health insurance policies
- Medical bills & records
- Prescription history

# Home Filing System Guide

 Pro Tip: Use color-coded folders or labels for quick reference (e.g., green for finances, blue for medical, red for legal).

## Step 4: Maintain Your Filing System

-  **Review your files every 3-6 months** – Toss, shred, or move outdated documents.
-  **Scan & back up important papers** – Keep digital copies in a secure cloud or external drive.
-  **Use a "Current Papers" Folder** – Bills to pay, forms to complete, or paperwork that requires action.

 Pro Tip: Keep essential documents (birth certificates, passports, wills) in a fireproof, waterproof safe for extra security.

## Bonus: Quick Organization Checklist

- Have a designated filing location (drawer, box, or cabinet)
- Use file labels for easy access
- Shred unnecessary papers regularly
- Store essential documents safely
- Set a reminder every 3-6 months to declutter & update

# DOCUMENT CHEAT SHEET

Not sure how long to keep paperwork? Use this quick guide to organize, store, and declutter your documents with confidence!

## **KEEP FOREVER (Store in a fireproof safe or secure digital backup)**

### **Personal & Legal Documents**

- Birth, marriage, and death certificates
- Social Security cards
- Passports & visas
- Wills, living trusts, power of attorney
- Adoption records
- Military records
- Citizenship & immigration paperwork
- Loan payoff confirmations

### **Property & Ownership Records**

- Home deed, mortgage paperwork & property title
- Home improvement receipts (until you sell the home)
- Vehicle titles (until sold)
- Insurance policies (keep the most current version)

### **Retirement & Investment Records**

- IRA & 401(k) statements (keep annual summaries forever)
- Pension & annuity documents

## **KEEP FOR 7 YEARS (For IRS & tax-related reasons)**

### **Tax Documents & Financial Records**

- Tax returns & supporting documents (W-2s, 1099s, receipts)
- Bank statements & canceled checks (if tax-related)
- Investment records (stocks, mutual funds, retirement contributions)
- Medical bills & expenses (if deducted on taxes)

# DOCUMENT CHEAT SHEET

**KEEP FOR 1-3 YEARS (Until no longer needed for reference or warranties expire)**

## Financial & Household Documents

- Pay stubs (keep until W-2 is verified)
- Bank statements (unless needed for tax purposes)
- Credit card statements (shred after 1 year unless tax-related)
- Utility bills (shred after 1 year, unless needed for business deductions)
- Home & auto insurance policies (keep current versions; shred old ones)
- Warranty documents (shred after expiration)
- Medical bills (keep 1 year unless disputing a charge)
- Rental lease agreements (keep until 1 year after moving out)

**KEEP FOR 30-90 DAYS (Shred once payments are verified or documents are no longer needed)**

## Short-Term Records

- ATM & deposit receipts (shred after checking statements)
- Monthly bills (shred after payment is verified)
- Sales receipts (shred after return/exchange period ends, unless needed for warranties)

## Bonus: Smart Storage & Decluttering Tips

- ✓ **Digitize & Store Securely** – Scan important docs & back up to the cloud or an external hard drive.
- ✓ **Use a File System** – Label & color-code folders for easy access.
- ✓ **Shred When In Doubt** – For sensitive documents, use a cross-cut shredder to prevent identity theft.
- ✓ **Review Annually** – Set a reminder to purge unnecessary paperwork every year.

# Monthly Declutter Checklist

Tired of piles of paper taking over your home? Use this simple monthly checklist to sort, declutter, and organize your documents—so you never lose important paperwork again!

## Step 1: Gather & Sort Your Papers

- Collect all loose papers from around the house (desk, kitchen counters, bags, etc.).
- Separate into four categories: Keep | File | Shred | Recycle.

## Step 2: File Important Documents

- File essential papers into your Home Filing System (Use your labeled folders!).
- Scan and back up important documents digitally (Cloud storage or external hard drive).
- Double-check that important paperwork (bills, tax documents, insurance papers) is stored securely.

## Step 3: Shred & Recycle Unnecessary Papers

- Shred documents with sensitive information (old bank statements, expired credit cards offers, etc.).
- Recycle newspapers, junk mail, outdated flyers, and non-sensitive paperwork.
- Remove yourself from unwanted mailing lists to cut down on future clutter.

## Step 4: Process Monthly Mail & Bills

- Open & review all unopened mail.
- Pay and file or set reminders for any outstanding bills.
- Discard expired coupons, promotional flyers, and old event invitations.

## Step 5: Review & Purge Old Papers

- Toss outdated receipts, warranties, and documents that no longer serve a purpose.
- Check financial & tax paperwork—file anything necessary and discard what's no longer needed.
- Go through kids' school papers—keep sentimental pieces & recycle the rest.
- Reassess manuals & warranties—discard ones for items you no longer own.

# Paper Decluttering Tips

Keeping paper clutter under control is an ongoing challenge, but with the right strategies and systems, you can stay organized and stress-free! Use these simple but effective tips to maintain an efficient home filing system and keep your paperwork under control.

## Step 1: Minimize Incoming Paper Clutter

Reduce the amount of paper that enters your home in the first place!

- **Go Digital:** Opt for paperless billing and digital statements whenever possible.
- **Unsubscribe from Junk Mail:** Use services like DMAchoice.org or CatalogChoice.org to remove yourself from unwanted mailing lists.
- **Say No to Unnecessary Receipts:** Many stores offer email receipts instead of printed ones—choose digital when available.
- **Create a Drop Zone:** Designate a single spot (like a wall-mounted file or basket) for all incoming mail, school papers, and notes.

## Step 2: Set Up an Easy Filing System

An effective home filing system should be simple, accessible, and easy to maintain.

- **Use Clearly Labeled Folders:** Keep categories broad but useful, such as:
  - Bills & Utilities
  - Insurance & Medical
  - Taxes & Financial Records
  - Home & Auto Documents
  - Kids' School Papers
- **Sort by Frequency of Use:** Keep frequently used documents (like current bills) in a separate folder for easy access. Store long-term records in a filing cabinet or fireproof safe.
- **Color-Code Your Files:** Use colored file folders or tabs to visually organize different categories at a glance.
- **Use a Digital Backup System:** Scan and store important documents (wills, contracts, medical records) digitally using Google Drive, Dropbox, or an external hard drive.

# Paper Decluttering Tips

## Step 3: Declutter Paper Regularly

Paper piles up quickly—make decluttering a routine so it doesn't get out of hand.

- **Follow the One-Touch Rule:** When you pick up a paper, act on it immediately—either file it, scan it, shred it, or recycle it.
- **Use a Monthly Declutter Date:** Pick one day a month to purge outdated papers using the Document Retention Cheat Sheet to guide what to keep and what to toss.
- **Sort Kids' Schoolwork:** Save only the most special pieces of artwork, report cards, or projects in a memory box or scanned digital archive.

## Step 4: Keep Essential Documents Safe

Some papers need to be stored long-term—keep them secure and accessible.

- Use a **Fireproof Safe** for birth certificates, passports, wills, and insurance policies.
- Create a **Grab-and-Go Folder** for important emergency documents (like medical records, home insurance, and contact lists).
- **Photograph or Scan** IDs and Important Documents as a backup in case the originals are lost or damaged.

## Step 5: Make Decluttering a Habit

Once you've decluttered and organized your paperwork, stay on track with these ongoing habits:

- **Shred Immediately:** Keep a small shredder near your drop zone to dispose of sensitive mail or outdated statements.
- **Sort Daily, File Weekly:** Go through incoming mail and papers daily, and file important documents once a week to prevent pile-ups.
- **Use a Year-End Purge:** At the end of each year, clear out old paperwork, outdated receipts, and expired warranties.

# Paper Decluttering Tips

## Bonus: What to Do with Sentimental Paper Items

If you're struggling with old greeting cards, letters, or sentimental paper clutter, try these ideas:

- **Create a Memory Binder:** Store special letters, kids' drawings, or sentimental notes in a scrapbook or binder with plastic sleeves.
- **Digitize Special Items:** Take photos of sentimental papers and create a digital memory book.
- **Use a Keepsake Box:** Dedicate a small box for sentimental paper clutter and set a limit —once it's full, sort and purge!

## Decluttering Paper is a Process, Not a One-Time Task

Paper clutter builds up quickly, but with a system in place, you'll stay ahead of the mess. Stick to a routine, use digital solutions when possible, and schedule regular decluttering sessions to keep your home paper-clutter free!

# Digital Organization

In today's digital world, managing files, emails, and passwords can be overwhelming. Without a system in place, important documents get lost, inboxes overflow, and digital clutter builds up fast. The good news? With a few simple strategies, you can regain control of your digital space and create an organized, stress-free system!

## Step 1: Declutter & Organize Digital Files

A cluttered desktop or overflowing downloads folder makes finding files frustrating. Let's fix that!


### Clear the Clutter

- **Delete Unnecessary Files** - Old documents, duplicates, and unused downloads take up space. Do a quick sweep to delete what you no longer need.
- **Sort by Category** - Move files into folders based on categories like Work, Personal, Finances, and Photos.
- **Create a Naming System** - Use consistent file names (e.g., "2024\_Taxes\_W2.pdf") so files are easier to search.
- **Declutter Your Desktop** - A messy desktop slows you down. Keep only essential shortcuts and move everything else to organized folders.

### Set Up an Easy File Organization System

Your computer should mirror a filing cabinet—with a clear folder structure. Use broad categories with specific subfolders:

- **Documents**    Work, Personal, School, Home
- **Finances**    Bills, Taxes, Insurance, Budgeting
- **Photos & Videos**    By year or event (e.g., "2024 Family Trip")
- **Important Records**    Wills, Home Documents, Medical

 **Pro Tip:** Store critical documents in Google Drive, Dropbox, or an external hard drive as a backup.

# Digital Organization

## Step 2: Declutter & Organize Your Inbox

If email overwhelm is a daily struggle, use these tips to get to inbox zero and maintain an organized system.


### Clean Up Your Inbox

- **Unsubscribe from Junk** – Use tools like Unroll.Me or manually unsubscribe from newsletters you no longer read.
- **Archive Old Emails** – Move completed conversations to folders to keep your inbox clutter-free.
- **Delete Unimportant Emails** – Promotional emails, old receipts, and unnecessary alerts should go.
- **Set Up Email Filters** – Automatically sort emails into folders (e.g., "Bills," "Work," "Family") to make important emails easier to find.

### Create an Email Organization System

Use folders or labels to categorize emails:

- **To-Do** – Emails that require action
- **Important** – Bills, medical records, contracts
- **Work** – Work-related messages
- **Personal** – Friends, family, subscriptions

 Pro Tip: Use the 2-Minute Rule—if an email can be handled in 2 minutes, respond and archive it immediately.

# Digital Organization

## Step 3: Organize & Secure Your Passwords

With so many online accounts, using the same password everywhere is a major security risk. But remembering different passwords is tough—unless you use a smart system.

### Create a Secure Password System

- **Use a Password Manager** – Apps like 1Password, LastPass, or Bitwarden store and autofill secure passwords.
- **Avoid Reusing Passwords** – Each account should have a unique password to prevent security breaches.
- **Enable Two-Factor Authentication (2FA)** – Add an extra layer of security for important accounts like banking or email.

### Create a Digital & Printed Backup

- **Save an Encrypted Digital Copy** – Store important passwords in a protected spreadsheet or a password manager.
- **Print a Backup List** – For ultra-important logins, keep a hard copy in a fireproof safe.

 Pro Tip: Use passphrases instead of passwords.

Example: “Sunset!Beach\$2024” is harder to hack but easy to remember.

## Step 4: Maintain Your Digital Organization

Once you’ve cleaned up your digital clutter, stick to a system to keep everything organized.

### Monthly Digital Decluttering Routine

- Delete Duplicate & Unused Files
- Empty the Recycle Bin/Trash
- Backup Important Files to Cloud or External Storage
- Clear Your Downloads Folder
- Unsubscribe from 3-5 Unwanted Emails
- Change Important Passwords if Needed

**JANUARY**

**FEBRUARY**

**MARCH**

**APRIL**

**MAY**

**JUNE**

**JULY**

**AUGUST**

**SEPTEMBER**

**OCTOBER**

**NOVEMBER**

**DECEMBER**

**BILLS TO PAY**

**RECEIPTS**

**BANK STATEMENTS**

**CREDIT CARDS**

**TAX DOCUMENTS**

**HOME INSURANCE**

**AUTO INSURANCE**

**MEDICAL INS**

**MORTGAGE**

**AUTO LOAN**

**LOANS**

**BUDGET**

**INVESTMENTS**

**RETIREMENT**

**UTILITIES**

**LEGAL DOCS**

**MEDICAL**

**IMMUNIZATION**

**VET RECORDS**

**SCHOOL**

**EMPLOYMENT**

**HOME WARRANTY**

**REPAIRS**

**MANUALS**

**WARRANTIES**

**CAR MAINTENANCE**

**INVENTORY**

**CONTACTS**

**NOVEMBER**

**DECEMBER**

**BILLS TO PAY**

**CHILDCARE**

**TRAVEL**

**SUBSCRIPTIONS**

**GIFTS**

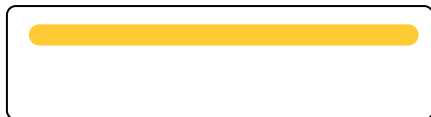
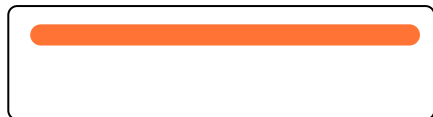
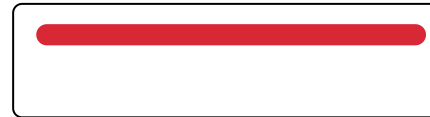
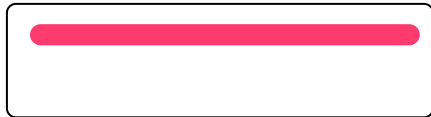
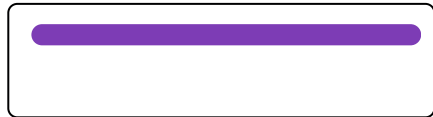
**HOLIDAYS**

**FILE**

**SHRED**

**SCAN**

**NEEDS ACTION**



# Paperwork Organization Tools

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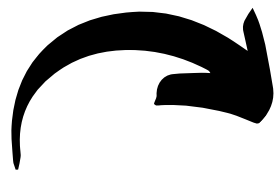
Streamline your home and digital organization with these recommended tools! Most of these items can be found on my [Amazon Idea List](#), while others, like cloud storage and password managers, are linked directly for easy access.

## Home Filing & Paper Organization

- **File Folder Labels** - Pre-labeled and blank options for easy sorting.
- **Expandable File Folders** - Perfect for categorizing important documents.
- **Fireproof Document Bag** - Extra protection for critical paperwork.
- **Shredder** - Safely dispose of sensitive documents.
- **Binder with Plastic Sleeves** - Ideal for storing receipts, warranties, and medical records.

## Digital Organization & Security

- **Cloud Storage Solutions** - Keep essential files safe and accessible. I recommend [Dropbox](#) or [Google Drive](#).
- **Password Manager** - Securely store and manage all your login credentials. Try [1Password](#) or [LastPass](#).
- **External Hard Drive** - Backup important files for extra security.
- **Cable Management Box** - Keep cords and chargers organized and clutter-free.
- **Screen Cleaning Kit** - Maintain a clean and smudge-free workspace.



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the list on Amazon

