

PAPER

Organizing Tips

REDUCING PAPER

- ☐ Recycle junk mail outside
- ☐ Call companies to cancel catalogs
- ☐ Unsubscribe from emails
- ☐ Go paperless!
- ☐ Visit the [Federal Trade Commission](#)
- ☐ Discrete [No Soliciting sign](#)

HOUSEHOLD

Retention recommendation: Annual

- ☐ Auto
- ☐ Action Required Folder: bills, response requested, reading
- ☐ Coupons (unexpired)
- ☐ Documents for upcoming travel
- ☐ Employment
- ☐ Finance (banking etc.)
- ☐ Health (medical and dental)
- ☐ Receipts (clothing/possible returns)
- ☐ Receipts for this year's taxes
- ☐ Recipes
- ☐ [Tax returns](#) (ex. seven years)

RECORDS & ARCHIVES

Retention recommendation: Indefinitely

- ☐ Appraisals
- ☐ Birth certificates
- ☐ Business-specific records (licenses, certificates, and tax documentation)
- ☐ Car titles
- ☐ Contracts
- ☐ Death certificates
- ☐ Deeds
- ☐ Estate planning and wills
- ☐ Graduation certificates
- ☐ Home inspection report
- ☐ Insurances
- ☐ Leases
- ☐ Loan documents
- ☐ Marriage certificates
- ☐ Mortgages
- ☐ Passports
- ☐ Pet records
- ☐ Receipts (i.e., large home and auto)
- ☐ Social Security cards
- ☐ Warranties

CHILDREN

Decide what matters most to you; ideas include:

- ☐ Awards
- ☐ Certificates
- ☐ Class photos
- ☐ Excellent projects, essays, and tests
- ☐ Report cards
- ☐ Select artwork
- ☐ Yearbooks
- ☐ Not worth keeping: spelling tests, worksheets, math quizzes.

MEMORY BOXES

A labeled hanging folder for:

- ☐ Baby
- ☐ Toddler
- ☐ Preschool
- ☐ Grades 1-12
- ☐ College
- ☐ Grades
- ☐ Reports and Projects
- ☐ Birthdays
- ☐ Awards
- ☐ Artwork

DECLUTTERING

- ☐ Decide a regular cadence
- ☐ Common paper clutter includes bank statements, pay slips, tax documents, after-visit summaries, academic paperwork, paid bills, manuals, expired coupons, and junk mail.
- ☐ Consider a shred service for bulk proprietary and private documents

PRODUCTS

- ☐ Storage bin
- ☐ Fireproof box
- ☐ Hanging folders
- ☐ Label maker
- ☐ Product links

Notes:

thank-you

THEE
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LIFE

Contact:

hello@thetailoredlife.com

www.thetailoredlife.com

[@thetailoredlife](https://www.instagram.com/thetailoredlife)