ROOM BY ROOM · PAPERS AND RECORDS

How to Organize Important Papers

How to sort, scan and store your important documents in one fireproof place.

WHERE TO START

Get a fireproof file box and your supplies ready before you open a single folder.

WHAT YOU'LL NEED

- ☐ A fireproof file box
- ☐ Scanner or a scanning app
- ☐ File folders and labels
- ☐ A flash drive

BEFORE YOU BEGIN

Put the time on your calendar like any other appointment. Give it one unhurried sitting at the kitchen table.

The method

1. **Gather every paper**
   Bring them all to one table: the drawer, the counter, the folder in the car. One pile you can see beats five you can't.
2. **Keep only what you need**
   Shred or recycle duplicates, old statements and anything you can find again online.
3. **Scan what matters**
   Save a copy in the cloud and on a flash drive. A phone scanning app works if you don't have a scanner.
4. **Sort into categories**
   Make a pile for each category before you label a single folder.
5. **File and label**
   One folder per category, labeled clearly enough that someone else could find what they need.
6. **Choose where it lives**
   Somewhere easy to reach, so it gets used and kept up instead of avoided.

Good to know

Use categories

Legal, money, taxes, insurance, medical, home, auto and business.

Two backups

Save scans in the cloud and on a flash drive.

List what's inside

Print a list of each folder's contents and keep it in the box.

KEEP IT THAT WAY

Keep the box where it's easy to grab in an emergency, and add new papers as they come in.

ONE THING TO REMEMBER

Your family should be able to find what they need without asking you.

YOUR CHECKLIST IS ON THE NEXT PAGE

More tips and photos in the full post: read it here

ROOM BY ROOM · PAPERS AND RECORDS · CHECKLIST

Important Papers Checklist

STARTED _____ DONE _____

- [ ] Research and buy a fireproof file box.
- [ ] Get your supplies ready: a scanner, file folders, labels and a pen. A phone scanning app works if you don't have a scanner.
- [ ] Organize your documents into categories, such as:
  - [ ] Legal
  - [ ] Insurance
  - [ ] Home and auto
  - [ ] Money and taxes
  - [ ] Medical
  - [ ] Business
- [ ] See the Document Categories list for what goes in each.
- [ ] Scan your important documents and save them in the cloud and on a flash drive.
- [ ] Create a file for each category you need, put your documents in their files and label each one.
- [ ] Make a list of what's in each file, print it and keep it inside your box. Keep a copy of the list on the backup flash drive.
- [ ] Choose where to keep your fireproof box: somewhere easy to reach in an emergency.

NOTES

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