

## BASIC DECLUTTERING CONCEPTS

1. Don't beat yourself up – you didn't acquire everything overnight so you won't be able to get rid of it overnight. Progress not perfection.
2. Create a plan of attack. Only handle it once.
3. Schedule a time to do it.
4. Set a timer.
5. Don't leave the room or area where you are decluttering. Don't get distracted.
6. A place for everything and everything in its place.
7. For the future: Don't let it in your home! Consider going digital.
8. Do what works for you. Decluttering is a personal adventure.

## GETTING READY TO DECLUTTER PAPER

### SUPPLIES

Pens, pencils, markers, and highlighters

Scissors, stapler, stapler remover, paper clips, binder clips, letter opener, sticky notes

File folders, hanging folders desktop filing box, filing cabinet, binders, manila envelopes,

Shredder

Recycling bag

Fire and Water Proof pouch

ID Roller

Trash Can

### WHAT IS PAPER?

Ads

Bills

Brochures

Business cards

Charity requests

Coupons

Documents

Drawings

Greeting cards

Invitations

Letters

Lottery Tickets

Magazines

Manuals

Newspapers

Photos

Receipts

Recipes

Take-out menus

Unsolicited mail

## Which Papers Do I Need To Keep

Disclaimer: this is not legal advice Check with attorney, CPA, tax preparer, Executor or Administrator, taxing authorities such as the IRS, etc.

Check with the IRS – three and seven year rules and some forever

Documents related to real estate purchases and rentals (deeds, insurance, repair records, warranties)

Identifying Documents – birth certificate, divorce decrees, passport, social security card, marriage certificate, military id, death certificate, custody arrangements, pre and post nuptial agreements, citizenship papers

Some medical records

Car records (repairs, maintenance, recalls)

Supporting documents for tax returns

Investments (capital gains)

Any letter or document that says you don't owe anything

\*\*<https://www.forbes.com/advisor/taxes/financial-documents-what-to-save-what-to-throw-away/>

## Questions to Ask Yourself

Can I easily retrieve it from the bank, credit company, etc, (check for the length of time they are kept)?

What is this paper telling me? Do I need to keep the paper? Should I set up an alert system?

Do I have a system so I can easily retrieve it?