

PAPER ORGANIZATION

Wednesday, September 13, 2023

Special presentation for DOROT

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ADDCA Associate Certified Coach

Institute for Challenging Disorganization specialist certifications:

ADHD, Chronic Disorganization Specialist, Time Management and Hoarding Behavior

NAPO (National Association for Productivity and Organizing Professionals) Certifications:

Residential Organizing, Workplace Productivity, and Life Transitions.



Objectives:

- Start thinking differently about paper
- Learn a system that decreases overwhelm and immediately starts reducing paper clutter
- Leave with a plan

Let's talk about the WHY!

- Spend more time IN your life, instead of ON your life
- Be able to find things when you need them
- Flexibility:
 - Moving
 - Downsizing
 - Social connection
- It's a gift to others in your life
- Peace and happiness in the next chapter of your life

What is MY "why?" _____

ORGANIZING

- SORT
- REDUCE
- CONTAINERIZE

INFO OVERLOAD!

- Americans now use about 31.5 million tons of printing and writing paper each year. That's about 660 pounds per person.
- USPS reported that an average American household receives 454 pieces of mail every year.
- 1 in 5 Americans admit feeling overloaded by information.

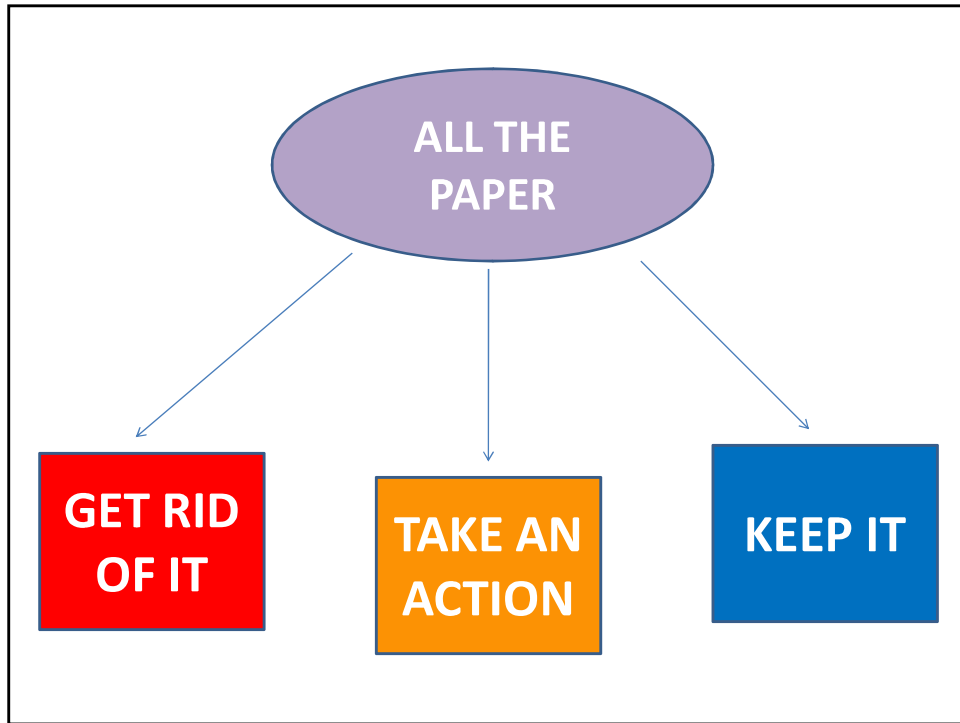
What causes overwhelm with paper?

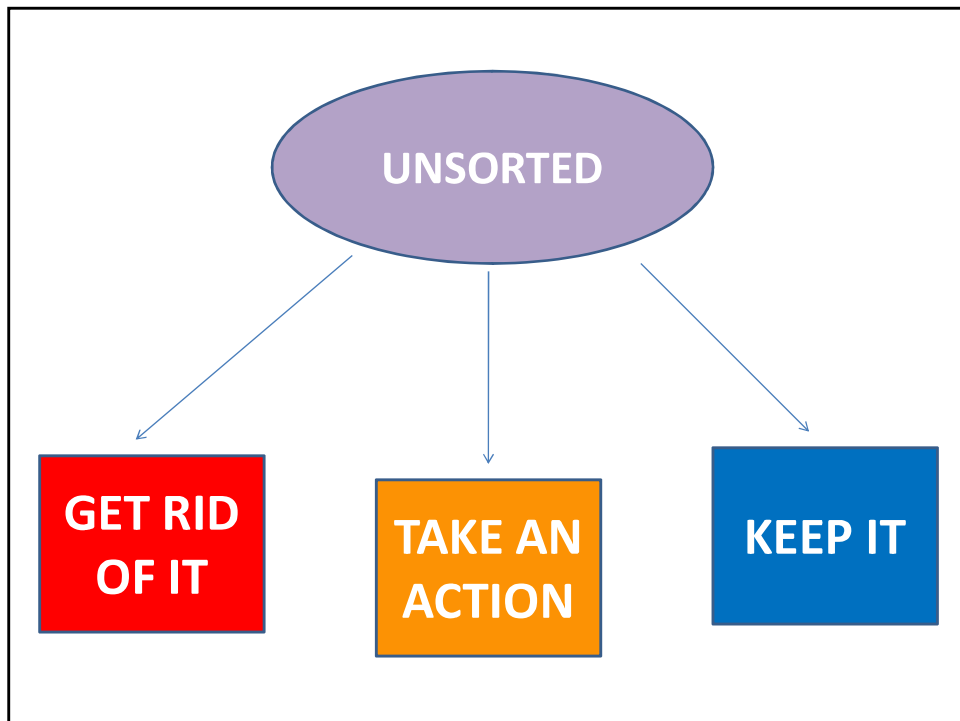
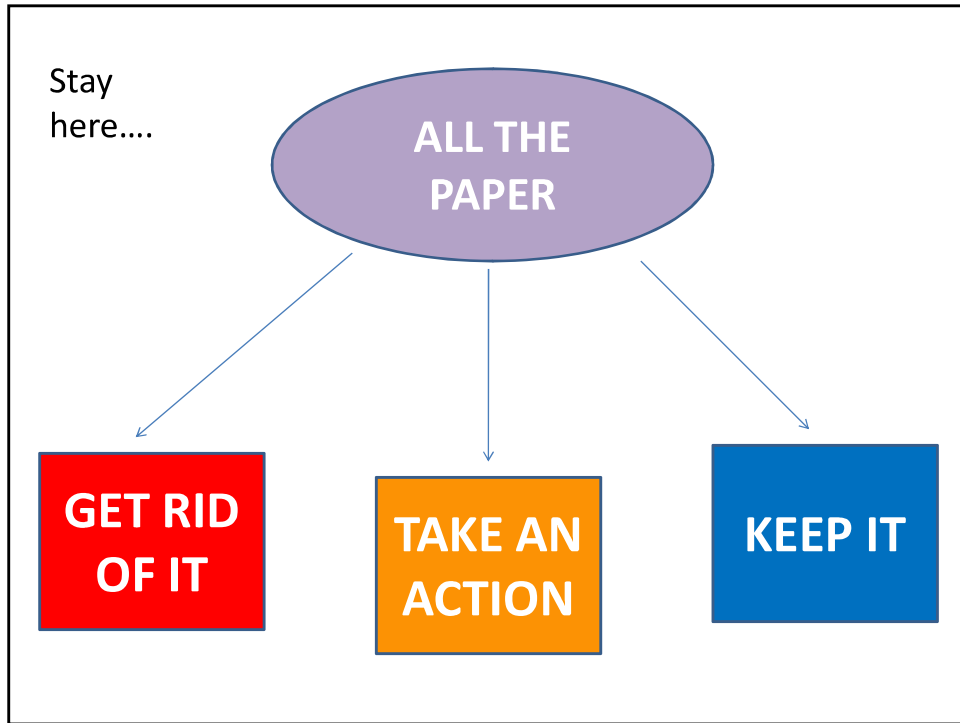
- Don't know where to start or don't have a system
- Subcategorize too early
- Cart before the horse
- Create many piles and they don't go anywhere
- Delayed decisions (All clutter is delayed decisions!)
- Churning
- Lack of consistency and/or can't finish
- Have proved to their brain that dealing with paper feels terrible
- ADHD, executive function deficits, anxiety, depression, fear, perfectionism, analysis paralysis...

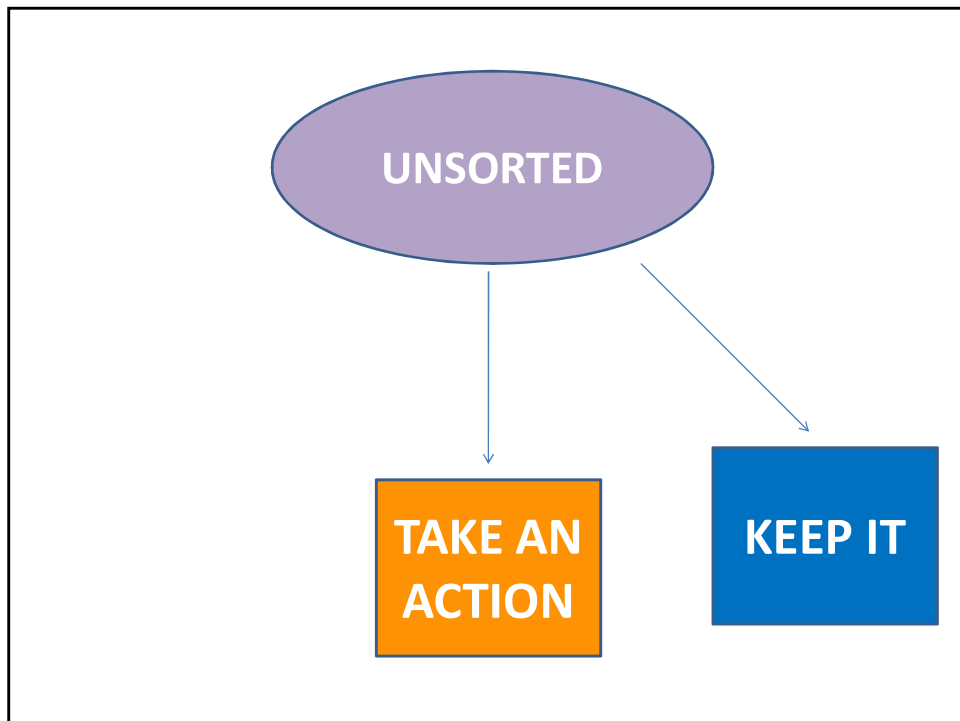
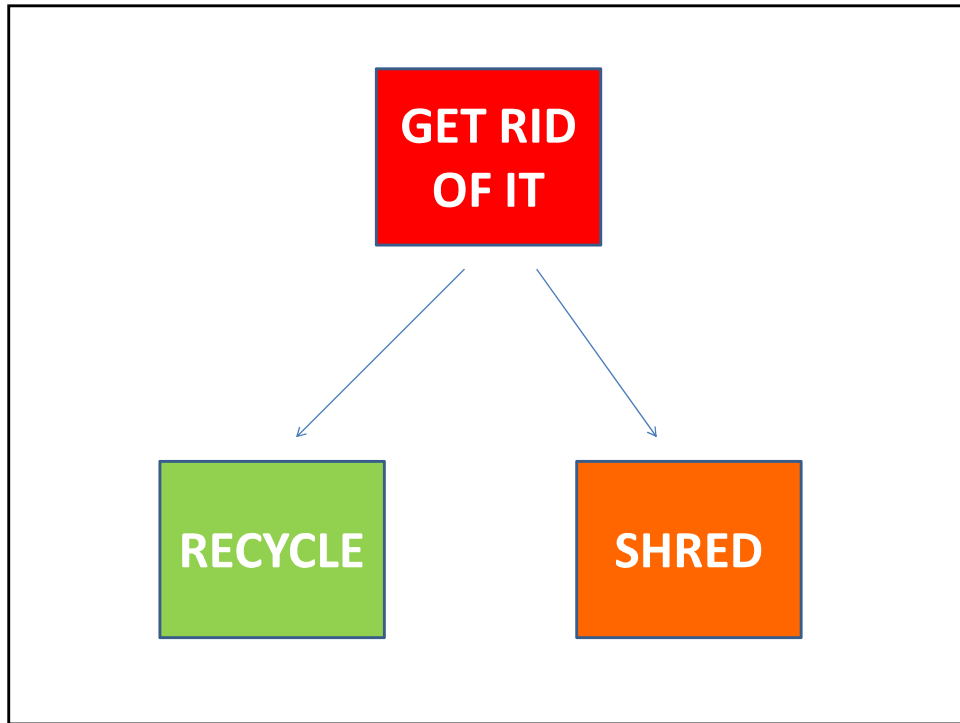
What causes me to become overwhelmed? _____

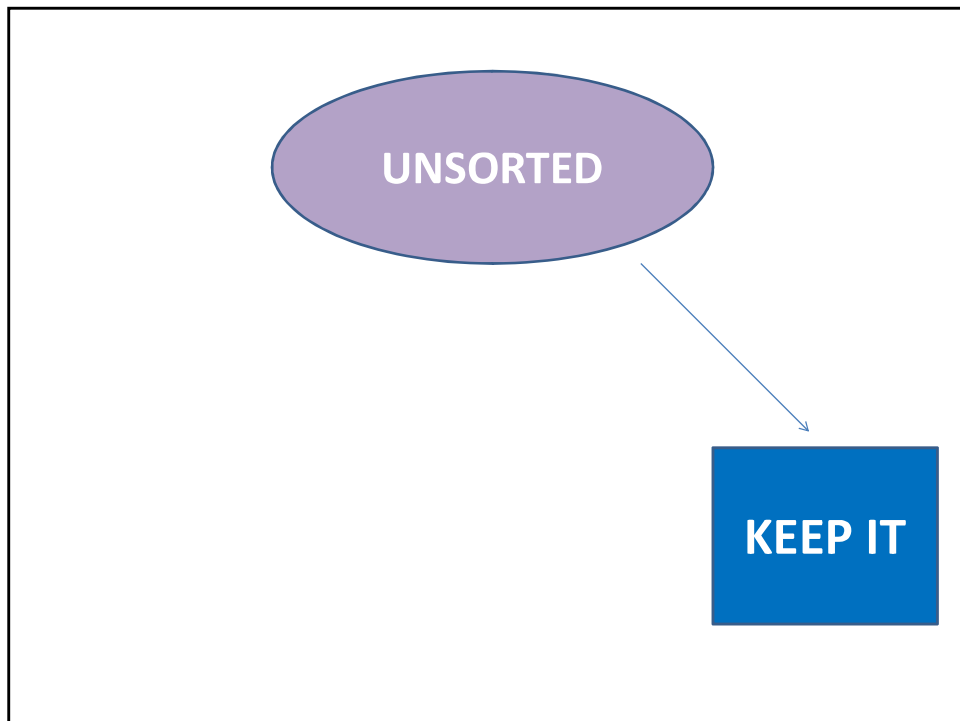
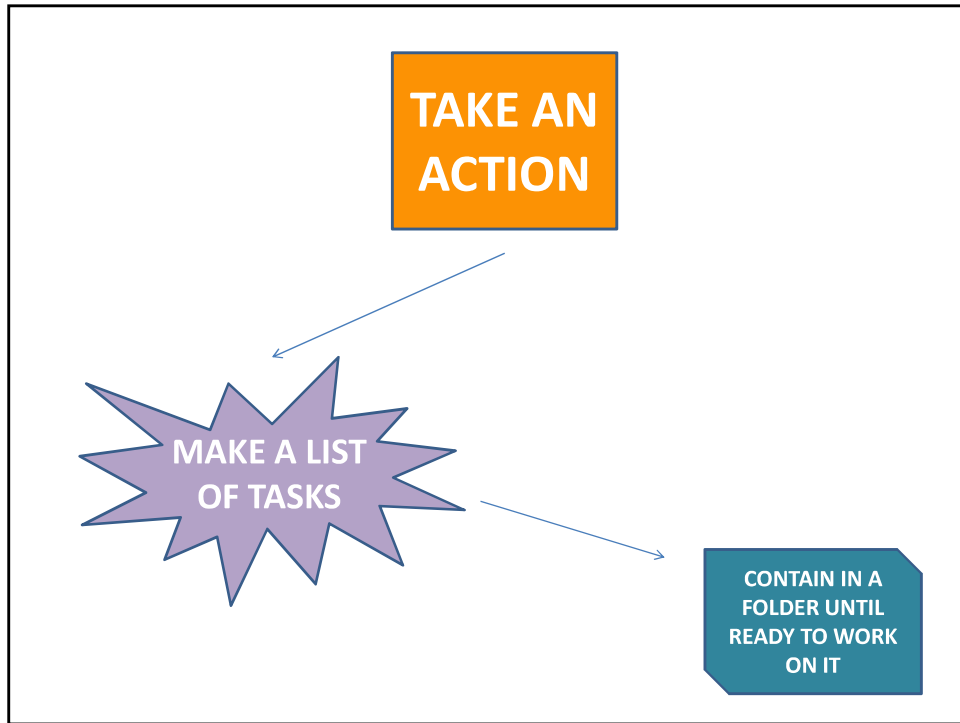
THE BIG IDEA!

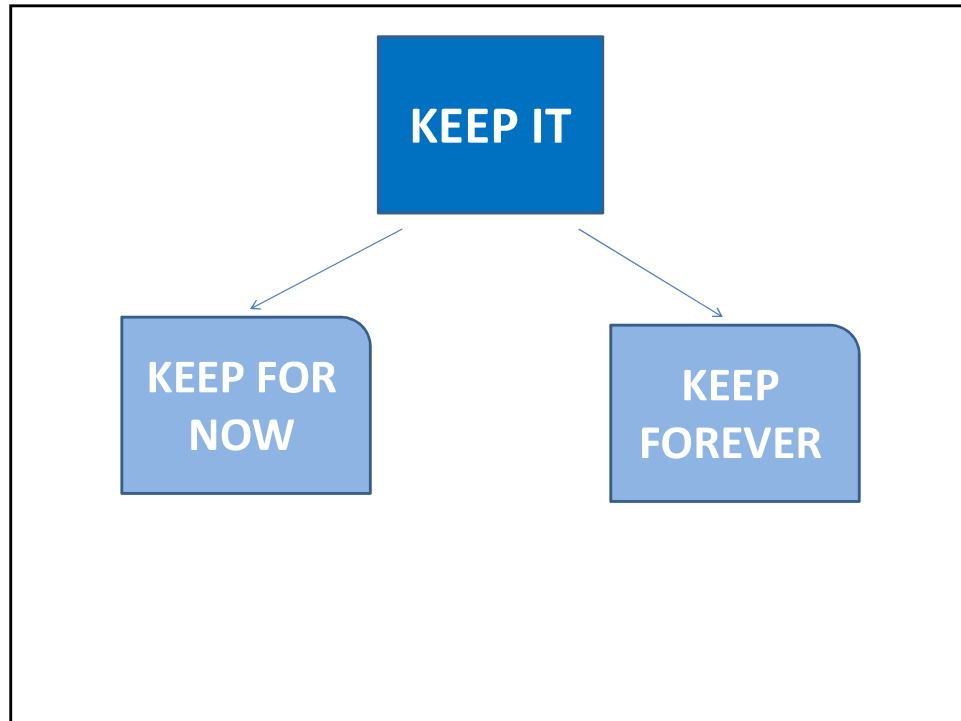
There are only **THREE** things you can do
with a piece of paper











The diagram is enclosed in a black rectangular border. At the top center is a light blue rounded rectangular box with the white text "KEEP FOREVER". Below this box is a bulleted list of criteria for items to be kept forever.

- In general, “forever” is either:
 - Information/reference that you can’t get anywhere else (health records, notes from a workshop, record of property maintenance)
 - Proof of something you need indefinitely (contract, policy, birth certificate, tax return, deed, receipt linked to a warranty, jury duty)
- Ask your accountant or attorney.
- Use my list as a starting place.
 - Your accountant or attorney gets the final word!
- Memories

KEEP FOREVER

- Use a file cabinet or a file box
- Tools:
 - Hanging files with tabs
 - File folders
- BROAD CATEGORIES
 - Hanging file tabs
- SUB-CATEGORIES
 - File folders

KEEP FOREVER

- TIPS
 - For the broad categories, think as broadly as you can
 - Words matter!
 - What word will you look for when going in search of this information?

KEEP FOREVER

Examples of broad categories & subcategories:

AUTO: Repair
 Loan/Lease
 Registration
 Insurance

OR

KEEP FOREVER

INSURANCE: Home Owners'
 Auto

FINANCIAL: Loan: Auto
 Checking: Chase 7198

AUTO: Repair
 Registration

How long should I keep papers?

- Until transactions have been verified:
 - Utility bills
 - Bank statements
 - Credit card statements
- Keep insurance policies while they remain active
- Keep tax records according to the IRS recommendations

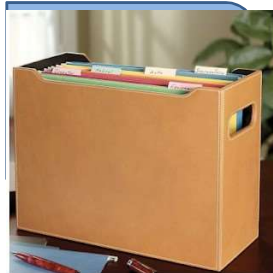
How long should I keep papers?

- Keep original documents forever
 - Marriage licenses
 - Divorce decrees
 - Custody decrees
 - Birth certificates
 - Adoption papers
 - Death certificates
 - Wills
 - Trusts
 - Powers of attorney
 - Social Security cards
 - Citizenship papers
 - Military records

How long should I keep papers?

- Keep property and investment records while you own the asset
 - Real estate — deeds, mortgage documents, closing papers and receipts for home improvements
 - Vehicles — titles and purchase or lease documents
 - Household items — receipts, warranty certificates and operating instructions
 - Financial — investments, stock certificates and retirement plan records
- **REMEMBER:** Your attorney or accountant gets the final say! This is just a list to take to them and ask if it's appropriate for you to use.

KEEP IT



KEEP FOR NOW

- What do you need **ONLY** until you can confirm that it's been properly processed or paid?
 - Bank statements
 - Paid bills (credit cards, utilities, etc.)
 - Receipts
 - EOBs
 - Certain financial statements
- What do you need only until you file your tax return?

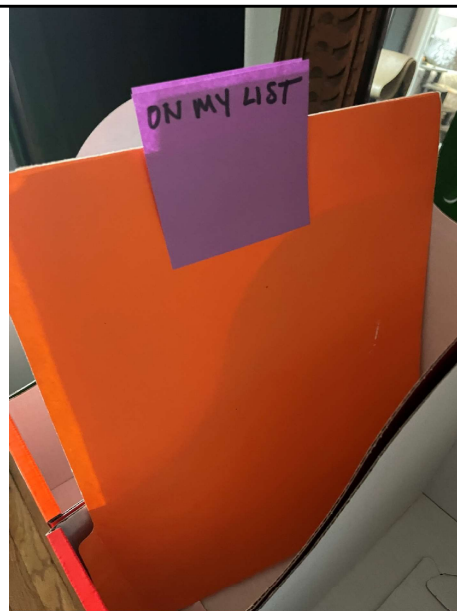
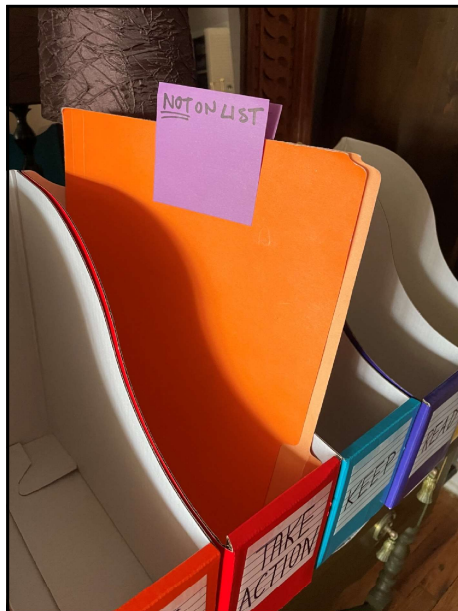




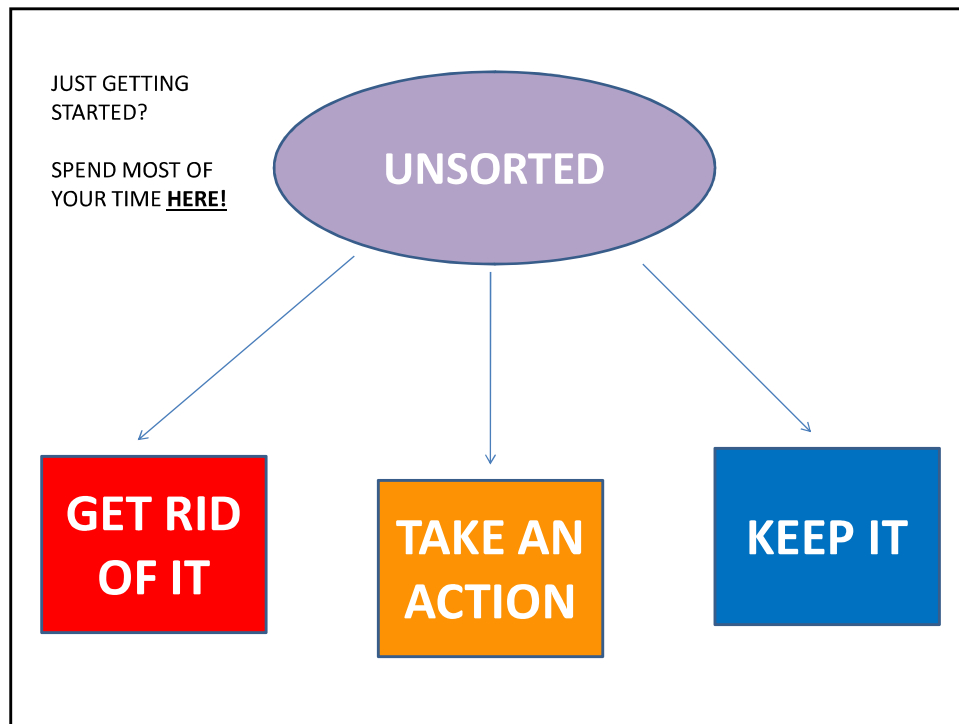
Purge your Keep-For-Now file once
a year, after you file your taxes.

Never clean out a file cabinet again!

How to use your vertical files to keep paper under control



Use a divider in your TAKE-ACTION box



“Tools and systems are only as good as the habits that surround them.”

- Progress, not perfection.
- Be kind & gentle with yourself.
 - No hard decisions. Err on the side of keeping.
 - O.H.I.O. – Only Handle It Once
- Make an appointment with yourself and honor it.
- Use accountability.
- Use a timer. (30 min = 20 + 10 clean-up)
- Prove to your brain that it’s not horrible!
- Take the time to set yourself up right.

“Tools and systems are only as good as the habits that surround them.”

- End with the beginning in mind.
- Know where you’re starting next time.
- Move your labeled piles to a place where they will not be disturbed or be disruptive.
- Don’t leave an organizing session without setting your next one.
- Consistency is key.
- Have rules for yourself when the bins get full.

“Tools and systems are only as good as the habits that surround them.”

- Get your dopamine up!
- Remember that everything is an experiment.
- Practice!
- If you are struggling, please contact a professional organizer, strategist, or a coach. They will help you identify barriers to action.

MAKE YOUR PLAN

What is one takeaway from today's talk? _____

What's one simple, very achievable step you will take in the next week?

Dates and times of my next paper-organizing sessions with myself:

Tools I Will Need:

- For paper sorting:
 - Post-its
 - Marker or pen
 - Optional: Evelots Magazine File Holders 6 colors \$12.99 for set of six
 - File folder or piece of cardboard to make a divider for your Take-Action bin
- For Forever paper:
 - File bin or file cabinet
 - Hanging files with plastic tabs
 - File folders
- For Keep-For-Now paper:
 - Accordion file OR
 - Desktop file holder OR
 - Use front part of your file cabinet or bin
- For Take-Action paper:
 - Notepad
 - File labeled "Take Action: On my list"
- For Get-Rid-Of paper:
 - Recycling bag
 - Shredder or shredding service