

# Office Organizing Checklist - HOME

From Ch 9: *Ignite the Organizer in You*

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## Task Related . . .

- |   |   |
|---|---|
| <input type="checkbox"/> New Mail to Sort | <input type="checkbox"/> To Be Shred      |
| <input type="checkbox"/> Urgent 911       | <input type="checkbox"/> To Be Scanned    |
| <input type="checkbox"/> Waiting For      | <input type="checkbox"/> Ongoing Projects |
| <input type="checkbox"/> To Be Filed      | <input type="checkbox"/> Future Projects  |

## House Related . . .

- |   |   |
|---|---|
| <input type="checkbox"/> House Related  | <input type="checkbox"/> Warranties     |
| <input type="checkbox"/> Car info       | <input type="checkbox"/> Cable & Phone  |
| <input type="checkbox"/> Mortgage       | <input type="checkbox"/> Utilities      |
| <input type="checkbox"/> HOA Related    | <input type="checkbox"/> Insurance      |
| <input type="checkbox"/> House Projects | <input type="checkbox"/> House Receipts |

## Money Related . . .

- |   |   |
|---|---|
| <input type="checkbox"/> Bank Statements    | <input type="checkbox"/> Family Member #1   |
| <input type="checkbox"/> Credit Cards       | <input type="checkbox"/> Family Member #2   |
| <input type="checkbox"/> Financial Services | <input type="checkbox"/> Retirement Related |
| <input type="checkbox"/> Insurance - IRA's  | <input type="checkbox"/> Receipts           |
| <input type="checkbox"/> Vendor Statements  | <input type="checkbox"/> Other              |



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## Family Related . . .

- Quick Review In/Out Box
- School & Activities Info
- Sports & Camp Info
- Travel Docs
- Memory Keeping Member #1
- Memory Keeping Member #2

## Pet Related . . .

- Insurance
- Grooming and Boarding
- Pet Receipts
- Other

## Taxes . . .

- 2017 Taxes
- 2018 Taxes
- 2019 Taxes
- 2020 Taxes

## Health Related . . .

- Medical Statements
- Dental Statements
- Specialist Care
- Receipts
- Family Member #1
- Family Member #2

## Forever Docs . . .

- Trust Documents & Wills
- Social Security Info
- Divorce Papers
- Birth Certificates & Passports

## Misc . . .

- Item: \_\_\_\_\_
- Item: \_\_\_\_\_
- Item: \_\_\_\_\_
- Item: \_\_\_\_\_