

What's In Your Files? Seven Steps to Creating an Effective Filing System



Supplies needed:

Label maker
Hanging File Folders-your choice of color
Manila folders-your choice of color
File Cabinet or container to store files
Pen or Pencil

Let's get started.

What does your current filing system look like. Are your papers in folders? Are they thrown in a file cabinet or drawer? Are they piled on top of your desk?

Take time to go through the papers and see what you have. For example, do you have bank or mortgage statements, medical records, client information, insurance statements? Discard anything that's outdated.

On a sheet of paper, write down the major categories for your files. I recommend using the name of your bank i.e. "CHASE" instead of 'Bank Statement'. Be specific so everyone gets a home. As you go through the papers, in the upper right hand corner write in the file name. This way you won't forget where it goes.

If you want, you can color code your files-remember this is your filing system, you can be as colorful as you want or you can stick to a uniform method. The key is to have fun!!

Make sure your manila folders have the same name as your hanging folders. So if you're manila folder says *Chase*-be sure to label your hanging folder *Chase*.

I suggest putting your files in alphabetical order. This will save you time when you need to find a file.

Remember to take action on your papers so they don't pile up on you. It only takes a few minutes each day to file. Once you have your system down, it's a piece a cake.

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