

List of folders I use:

Everyone is different and will need different folders – this is just an example of how I use my home office & file system. It is also not the only right way – just how I've found success. I keep papers for the time the IRS recommends. Here is a good link: <http://www.bankrate.com/brm/news/mtg/20000518h.asp>.

Top Control Drawer (I access this often):

Follow Up Forms – I have follow up forms & blank FULL SIZE paper.

Waiting on Response – If I called someone and am waiting to hear from them I put an coordinating information in this file folder & make a follow up sheet to remind me to check this folder periodically.

“1” to “31” folders

“January” to “December” folders

Bottom File Drawer (because I do not access this each day):

Coupons – I put my Family Christian catalog in here, Jo Ann coupons, Bed Bath & Beyond, etc... I also have a sub folder for rebate information in here

Derek (my husband) to-do folder – he checks this each night

Finance & Budget – I put reconciled bank statements I've printed off the internet in here & a notebook to keep notes for myself

Gifts – I have subfolders: “To Make”, “To Buy others”, “Me” – then before birthdays and Christmas I can access this or tell my husband to

Grocery Lists – I have TONS of the Excel spreadsheet list in here to pull out and use

Homeschool information – we are considering this so as I find catalogs, information I put it in here

401K & Roth folders

Alltel

City

College funds – we are saving for college so statements go in here
Derek pay stubs

Erica pay stubs – I do not have a job, but I have a subfolder with my retirement information from my old job, etc... here

Emily school – this is where I collect Box Tops (in an envelope), have her School Handbook, a class list, etc...

Life Insurance

Medical – I have various subfolders that coordinate with my medical & insurance needs

Money Markey funds

PNM

Qwest

Spa – we have a gym membership and our handbook, coupons, membership agreement are in here

State Farm

Wells Fargo

XM Radio

Etc... - this is the folder I'll put magazine subscription information in,
book order information, etc....