



HOME FILING SYSTEM FOLDER MAP

TICKETS EARNED _____ / 5

1 per step you finish. Check off the Done box on a step, then count your boxes and write the number here.

One spot for new papers, the folders you need, and where each one lives.

ADMINARCADE.COM Life admin for people who hate it

1

THE TO-FILE SPOT

Every new paper lands here until you file it. Pick one.

☐ A tray on the counter

☐ One folder marked "To file"

☐ A big envelope by the door

☐ A "To file" folder in my email

MINE IS _____

I CLEAR IT ON (day) _____

DONE ☐

2

THE FOLDERS

Check NEED for each folder that fits your life. Rename anything so it makes sense to you.

NEED	FOLDER AND WHAT GOES IN IT	PAPER	FILE	EMAIL	PHONE
☐	Taxes returns, W-2s, 1099s, deduction receipts	☐	☐	☐	☐
☐	Bank and cards statements, loan papers, account list	☐	☐	☐	☐
☐	Bills, paid utility, phone, credit card	☐	☐	☐	☐
☐	Insurance car, home or renters, health, life, claims	☐	☐	☐	☐
☐	Medical history, medication list, bills	☐	☐	☐	☐
☐	Work and retirement pay stubs, benefits, pension papers	☐	☐	☐	☐
☐	Warranties and manuals receipts for big appliances	☐	☐	☐	☐
☐	Will and estate papers copies here, originals where your lawyer says	☐	☐	☐	☐
☐	Home mortgage or lease, property tax, repairs	☐	☐	☐	☐
☐	Car loan, registration, service records	☐	☐	☐	☐
☐	Pets vet records, vaccines, microchip number	☐	☐	☐	☐
☐	Side income 1099s, income log, receipts	☐	☐	☐	☐
☐	_____ your own folder	☐	☐	☐	☐
☐	_____ your own folder	☐	☐	☐	☐

DONE ☐

3

THE KEEP-FOREVER BOX

Check off each original that's in the box. Only these go in it.

☐ Birth or adoption papers

☐ Social Security cards

☐ Citizenship papers

☐ Marriage or divorce papers

☐ Military records

☐ Family death certificates

☐ The deed

☐ Car titles

☐ Passports*

THE BOX LIVES _____

CHECKED ON (date) _____

*If your box is at the bank, keep passports at home. The FDIC says you might need one when the bank's closed.

DONE ☐

4

PAPER, FILE, EMAIL OR PHONE

Back in step 2, check one box per folder: **Paper**, saved **File** (computer or cloud), **Email** or **Phone** photo. Email is for finding a bill, not keeping it, so save a copy. The IRS accepts scans that are complete and easy to read. Keep the paper until you've checked them.

DONE ☐

5

BACK IT UP AND TELL SOMEONE

☐ 3 copies of saved files

☐ On 2 kinds of storage

☐ 1 copy outside the house

☐ A password on the drive

WHO KNOWS WHERE THIS MAP IS _____

YEARLY CLEAN-OUT (when) _____

DONE ☐