

# April

## Home Office (Last Minute Organizing for Tax Day)



### Declutter

- Cull old papers from existing files systems and countertops. Shred financial documents or those with sensitive information.
- Go through drawers and pull out supplies. Throw away junk.
- Divide paper into piles: 1) to pay; 2) to read; 3) to revisit at a later time; and 4) to file.
- Clean out old files from your computer (download a file like CCleaner to remove files).

### Clean

- Use cotton swabs with alcohol to wipe down keyboards.
- Dust all computer equipment - use canned air or vacuum. Pay attention to any CPU fans.
- Vacuum and clean furniture, floor, baseboards, cushions, walls, fan blades, lampshades and blinds.
- Move any items that do not belong in the office to a basket/bin. After finishing the room distribute items to their respective homes.



### Maintain

- Create a mail center. When mail is brought in daily sort immediately. Have a shredder and recycle/trash bin nearby. Open each piece of mail, separate out recycle from bills, etc... Then put into the following categories: 1. To Do (now) 2. To Do (1-2 months) 3. Pending and 4. File
- Create files based on categories you found when sorting during the cleaning stage.
- Set up a family calendar to record all important dates/events.
- Make a master list of all financial accounts, insurance policies and other important financial information. Keep this in a fireproof safe either onsite or at a bank.

