

Folder and File Structure



Folder and File Structure

- Create clear, simple and logical folders based on categories
 - Subject
 - Project
 - Numerical

Subject

- Arrange folders by a given Subject
- Requires choosing a word or phrase to stand for each subject. Example-
accounting vs bookkeeping
- Consider folder names that mirror your tax reporting requirements

Project

- Alphabetically according to project type (landscaping, home remodel)
- A project related folder may contain any combination of correspondence, bulletins, clippings, pictures, statistics or other information relating to the subject.

Numeric

Paper: Index system with master reference



Paper File Naming

- Chose file names based on how you relate or associate to the information. What will come to mind if you are looking for this information 2 years from now?
 - Accounting/Bookkeeping/Finances
 - Investments/Retirement
- Mirror tax reporting requirements
- File current papers in the front of the folder