

INCOMING MAIL NIP IT IN THE BUD

Do it now. Open each piece. Handle each piece only once.

Solicitations



Examples:

- Ads
- Catalogs
- Sweepstakes

To dispose:

- Shred or burn personal info.
- Dispose of the rest — trash or recycle.

Charitable Appeals



To Stop Charitable

Donation Solicitations:

- Call the organization — most sure-fire way they'll take you off their mailing list. Some have online option to opt out.
- Do not send a stop request in response envelope this goes to a secondary party — not the charity.
- Go to dmachoice.org/register.php or Paperkarma.com

Charitable Donation Strategies:

Make a list of the charities to which you want to donate. Make those donations on a yearly basis.

It is better to make fewer large donations than many smaller donations that will trigger increased unrequested charitable solicitations.

Individuals who are 73 years old or older may donate up to \$108K total to one or more charities directly from a taxable IRA in place of taking it as required minimum distributions. This is known as Qualified Charitable Distribution (QCD).

"Real" Mail



Examples:

- Bills & Payments
- Taxes & Insurance
- Government docs
- Health/Medical
- Banking/Credit card
- Personal mail/cards
- Family/Social
- School/Academic

To keep and file

Next Step – Sort:

1. File:

- Taxes & Insurance
- Government documents
- Health/Medical
- Statements & Receipts
- Bills & Payments
- Key Documents
- Academic
- Family/Social/Religious
- Personal/Cards/Memorabilia

2. Act:

Take care of these tasks now

3. Schedule Errands/ Projects/Events

4. Toss:

Keep Post-its, clips, notepad handy to write questions, dates, notes, contact info.

