

SIMPLIFY YOUR PAPERWORK

KEEP FOR 1 MONTH

- Receipts (file any deductible items)
- Bank statements
- Deposit/ATM slips

KEEP FOR 1-3 YEARS

- Mortgage statements
- Insurance documents
- All business + income related documents
- Proof of deductible purchases
- Checkbook ledgers
- Paycheck stubs
- Charitable contributions

KEEP FOREVER

- Birth certificates
- Marriage/divorce paperwork
 - Mortgages
- Vehicle Paperwork
 - Passports
- Investment statements
 - Wills
- Current insurance policies
- Medical records
- Home improvement receipts
 - Major purchase receipts
- Education records
- Pension & retirement records
 - Contracts
- Property agreements

KEEP FOR 7 YEARS +

- Medical bills + statements
 - Contracts
- Real estate tax forms + records
- Mileage records
 - Tax return paperwork
- W-2 and 1099s
- Cancelled checks
- Any receipts used as tax reductions