



What to keep and how to keep it?

Documents you need to keep physical copies of forever in a fireproof safe in your home or a safety deposit box (but they are more convenient in a fireproof safe at home):

- Birth and death certificates
- Social Security Cards
- ID cards and passports
- Marriage license
- Business license
- Stocks and Bonds
- Any insurance policy (good to keep even if they have a digital copy in case problems come up)
- Vehicle titles and loan documents
- House deeds and mortgage documents

Documents you need to keep physical copies of forever in a fireproof box in your home (and never ever in a safety deposit box):

- Your will, living will, and powers of attorney
- Any other wills in which you are designated the executor.

Documents to hold onto. You can scan them in if you like, or just store these documents in a safe place:

- Tax records and receipts (keep for seven years for the average person; 10 years if you running a business from your home)
- Pay stubs and bank statements (keep for a year if you actually get a physical piece of paper)
- Home purchase, sale, or improvement documents (keep for at least six years after you sell)
- Medical records and bills (keep at least a year after payment in case of disputes)
- Warranty documents and receipts (keep as long as you own them)

Documents you need to keep the most recent version of:

- Social security statements
- Annual insurance policy statements
- Retirement plan statements (401(k), 529, IRA, etc)

Shred everything else!

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Organization isn't about perfection. It's about efficiency, reducing stress and clutter, saving time and money, and improving your overall quality of life.

- Christina Scalise