



Shannon McGinnis, Professional Organizer
www.organized4success.com 831.566.0497

ORGANIZATION SAVES TIME AND MONEY, REDUCES STRESS, AND LEADS TO SUCCESS!

SAVE IT OR SHREAD IT?

Keep for 1 month:

- All receipts for returns
- Withdrawal and deposit slips (Shred these after reconciling monthly bank statement)

Keep for 1 year:

- Paycheck stubs
- Monthly bank, credit card, brokerage, mutual fund, and retirement-account statements.

Keep for 7 years:

- Tax returns, W-2s, 1099s
- Any tax supporting documents
- Year-end credit card statements, brokerage and mutual fund summaries

Keep indefinitely:

- Receipts for major purchases
- Real estate records
- Wills and trusts

What to store in your safe deposit/fire proof box:

- Birth certificates
- Bonds and stock certificates
- Social security cards
- Passports
- Marriage, business and professional licenses
- Vehicle titles
- Property deeds
- Wills and trusts
- Insurance policies

Other important items to consider:

- College Diplomas
- School Transcripts
- Old Tax Returns

BE SURE TO PHOTOCOPY EACH OF THESE FIRST