

# D How Long to Keep Documents



General Guidelines - Always research your specific needs & requirements

## Forever

Documents that are difficult to replace

- |  |   |
|--|---|
| <input type="checkbox"/> Birth Certificate       | <input type="checkbox"/> Property Deed & Mortgage Documents           |
| <input type="checkbox"/> Death Certificate       | <input type="checkbox"/> Vehicle Title (as long as you own it)        |
| <input type="checkbox"/> Social Security Card    | <input type="checkbox"/> Business License                             |
| <input type="checkbox"/> Marriage License        | <input type="checkbox"/> Estate Planning Documents                    |
| <input type="checkbox"/> Divorce Decree          | <input type="checkbox"/> Life-Insurance Policy (as long as in effect) |
| <input type="checkbox"/> Military Discharge Form | <input type="checkbox"/> Defined-Benefit Plan Documents               |
| <input type="checkbox"/> Passport                | <input type="checkbox"/> Inheritance Documents                        |

## 3-7 Years or More

Tax-related documents

- |   |   |
|---|---|
| <input type="checkbox"/> Tax Forms  | <input type="checkbox"/> Warranty Documents & Receipts (as long as you own the product) |
| <input type="checkbox"/> Supporting Documents (W-2, 1099, etc)                  | <input type="checkbox"/> Investment Purchase Details (until you sell)                   |
| <input type="checkbox"/> Home Purchase, Sale & Improvement Documents After Sale |   |

## 1 Year or More

For current year's taxes

- |   |   |
|---|---|
| <input type="checkbox"/> Pay Stubs                                    | <input type="checkbox"/> Annual Insurance Policy Statement                      |
| <input type="checkbox"/> Medical Records & Bills (in case of dispute) | <input type="checkbox"/> Voter Registration                                     |
| <input type="checkbox"/> Bank Statement                               | <input type="checkbox"/> Medical Records (as long as valid)                     |
| <input type="checkbox"/> Loan Documents (until paid off)              | <input type="checkbox"/> Receipts for high-value insured items (as long as own) |
| <input type="checkbox"/> Credit Card Statement                        |   |

## 1 Month

Until next statement arrives

- |   |  |
|---|--|
| <input type="checkbox"/> Bank Withdrawal & Deposit Slips (until reconciled) | <input type="checkbox"/> Cell Phone, Cable, etc. bills |
| <input type="checkbox"/> Utility Statements                                 |  |
| <input type="checkbox"/> Credit Card Receipts (until reconciled)            |  |

# Easy-to-Declutter Documents



- Junk Mail
- Expired Coupons
- Restaurant Menus (available online)
- Old Cards & Invitations
- Old Magazines
- Old Catalogs (keep only the current one)
- Poor Quality & Duplicate Photos
- Outdated School & Sport Schedules
- Expired Warranties & Old Manuals
- Manuals (if available online)
- Expired Insurance Policies
- Old Travel Brochures & Maps (available online)
- Old Bank & Investment Brochures
- Cancelled Checks (once you reconcile the statement & if not for tax purposes)
- Checkbook from Closed Account or If 7+ Years Old
- Old Recipes You Haven't Tried or Didn't Like
- Old Articles You've Never Read
- Receipts Once Reconciled & Not Needed for Taxes or Warranty)

# Paper Organizing

## Apps



AdobeScan- Scan & store documents

Apple      Google Play

CamScanner - Scan & auto upload to cloud service

Apple      Google Play

Evernote - Scan documents & store with notes

Apple      Google Play

File Manager - Download, organize & file documents

Apple      Google Play

FineScanner - Scan written & printed documents

Apple      Google Play

GeniusScan - PDF Scanner

Apple      Google Play

Keepy - Save & organize kids' artwork & school work

Apple      Google Play

ScanBot - Scan & save documents as pdf or jpg files

Apple      Google Play

ScannerPro - Scan & organize documents

Apple      Google Play