

What to KEEP. Where to STORE.

When to SHRED.



ORIGINALS YOU RARELY NEED:

	STORE IN ▼	SHRED ▼	COPIES TO ▼
Adoption Papers	Safe-deposit box	Never discard	Lawyer, Executor
Citizenship Papers	Safe-deposit box	Never discard	Executor
Divorce Decree	Safe-deposit box	Never discard	Lawyer
Lawsuits	Safe-deposit box	Never discard	Lawyer
Household Inventory	Safe-deposit box	Never discard	Financial Advisor
Photo of Possessions	Safe-deposit box	Never discard	Financial Advisor
Military Discharge	Safe-deposit box	Never discard	
Veteran Papers	Safe-deposit box	Never discard	

ORIGINALS YOU MAY NEED OCCASIONALLY:

	STORE IN ▼	SHRED ▼	COPIES TO ▼
Birth Certificate	In-home safe	Never discard	
Cemetery Deed	In-home safe	Never discard	Heir
Real Estate Deeds	In-home safe	10 years after sale	
Death Certificates	Locked cabinet	Never discard	Executor
Dipolmas	In-home safe	Never discard	
Guardianship Arrangements	In-home safe	Never discard	Executor/Guardian
Health Records	In-home safe	Never discard	Doctor
Immunization Records	In-home safe	Never discard	Doctor
Marriage Certificates	In-home safe	Never discard	Executor
Medical Directive	In-home safe	New one signed	Doctor, Heir
Naturalization Certification	In-home safe	Never discard	

TAX DOCUMENTS:

	STORE IN ▼	SHRED ▼	COPIES TO ▼
Bank Statements	Locked cabinet	7 yrs	
Cancelled Checks	Locked cabinet	7 yrs	
Credit Card Statements	Locked cabinet	7 yrs	
Home Purchase/Improvement	Locked cabinet	7 yrs after home sold	
Tax returns/supportive info	Locked cabinet	7 yrs after filing date	

INVESTMENT DOCUMENTS:

	STORE IN ▼	SHRED ▼	COPIES TO ▼
Annuity Contracts	Locked cabinet	Annuity paid out	Financial Advisor
Loan Agreements	Locked cabinet	10 yrs after payoff	
Pension Plan Documents	Locked cabinet	Never discard	Financial Advisor
Investment Account Statements	Locked cabinet	7 years after last investment is sold	