

EVERYTHING ORGANIZED | AROUND THE OFFICE

# PAPER PERFECTION

When it comes to organizing the office, your ideas, and all of the gadgets and paperwork that come with them; efficiency rules. Use the resources in this comprehensive packet to simplify and sort your paperwork .

Page 2 | An infographic-style guide and action plan to take control over your paperwork.

Page 3 | Always know how long to keep life's most important documents with the Document Lifespan Cheat Sheet.



# Document Lifespan CHEAT SHEET

DOCUMENT	HOW LONG TO KEEP IT
<b>Bank Statements</b> (monthly).....	Shred all statements received
<b>Bank Statements</b> (annual).....	1 year, to support tax filings
<b>Investment Statements</b> (monthly).....	Shred all
<b>Investment Statements</b> (annual).....	Keep until the investments are sold
<b>Investment Certificates</b> .....	Until you cash or sell them
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<b>Service Contracts</b> .....	Until expired
<b>Service Contacts and Warranties</b> .....	Until you sell or discard the items
<b>Home Improvement Records</b> .....	6 + years after you sell
<b>Home Purchase Records</b> .....	6 + years after you sell
<b>Real Estate Deeds</b> .....	As long as you own the property
<b>Car, Home, and Other Insurance</b> .....	Until you renew the policy
<b>Vehicle Titles and Vehicle Repair Records</b> .....	Until you sell the car
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<b>Receipts for Large Purchases</b> .....	Until you sell or discard the items
<b>Social Security Cards</b> .....	Forever
<b>Social Security Statements</b> .....	Shred outdated statements
<b>State-Issued Vital Certificates</b> .....	Forever
<b>Life Insurance Records</b> .....	Forever
<b>Tax Records</b> .....	7 years from the filing date
<b>Will and Other End-of-Life Documents</b> .....	Forever, unless updated

(Cut along the line) 