

DOCUMENT PRESERVATION TIPS

What to Keep Forever

- Birth and Death Certificates
- Social Security cards
- Pension Plan documents
- ID cards and passports
- Marriage license
- Business license
- Insurance Policies
- Wills, Living Wills, and Powers of Attorney
- Vehicle titles and loan documents
- House deeds and mortgage documents

What to Keep for a Period of Time

- Tax records and receipts (7 Years)
- Pay stubs and bank statements (1 year)
- Home purchase, sale, or improvement documents (6 years after you sell)
- Medical records and bills (1 year after payment)
- Warranty documents (as long as you own product)

What to Keep the Most Recent Version of

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