



Paperwork Starter Pack

Your records, sorted

General educational information, not legal or tax advice.
Retention times are common guidelines; some situations need longer.
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Document inventory

What you have, where the original is, and whether there's a backup copy.

Document	Whose	Original kept at	Scanned?	Notes
Birth certificates			☐	
Social Security cards			☐	
Passports			☐	
Marriage or divorce papers			☐	
Will, trust, power of attorney			☐	
Property deed			☐	
Vehicle titles			☐	
Insurance policies			☐	
Last 3 years' tax returns			☐	
Military discharge (DD-214)			☐	
Other:			☐	
Other:			☐	

Keep-or-shred guide

Common guidelines. Keep anything longer if it supports a tax return or an open dispute.

Document	Keep for
Vital records, SS cards, passports	Forever
Wills, trusts, powers of attorney	Forever (current version)
Loan payoff letters, deeds	Forever
Tax returns	At least 3 years; many keep for good
W-2s, 1099s, deduction receipts	With the return; 7 years to be safe
Home purchase and improvements	While you own it + 3 years after sale reported
Investment purchase records	While you own it + 3 years after sale reported
Insurance policies	While active + until claims settle
Big purchase receipts, warranties	While you own the item
Bank and card statements	About 1 year, unless for taxes
Pay stubs	Until matched to your W-2
Utility bills	Until the next bill shows payment

Where things are

So you, or someone you trust, can find anything quickly.

Home safe: location and who knows the code

Safe deposit box: bank, branch and where the key is

Paper files: location

Digital files: service or drive (not the password)

Backup drive: location

Attorney and where originals are kept

Person I've told where everything is

Downloaded from <http://ajph.org/>

Company names and contacts only. Never write full account numbers or passwords.

[illegible]

A simple record of what you cleared out, and when.

[illegible]

Next yearly purge date

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