

▶ How Long Do I Hold Onto Paperwork?

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- ▶ **Hold 7+ Years**
- ▶ Paycheck Stubs
- ▶ Mortgage Statements
- ▶ Checkbook Ledgers
- ▶ Expired Insurance Records
- ▶ Charitable Contributions Receipts
- ▶ Proof of Deductible Items
- ▶ Business Deductible Receipts
- ▶ Income Related Deductible Items
- ▶
- ▶
- ▶ **Hold FOREVER**
- ▶ Birth, Marriage, Divorce Certificates
- ▶ Mortgage & Insurance Paperwork
- ▶ Passports
- ▶ Car & Property Titles
- ▶ Wills
- ▶ Home Improvement & Major Purchase Documents
- ▶ Medical Records
- ▶ School Records
- ▶ Contracts
- ▶ Pension & Retirement Records
- ▶
- ▶
- ▶ *Disclaimer: All material, verbal, written, et al, and related items is provided for entertainment purposes only. Please contact professionals regarding any legal or accounting questions.*

Hold 1-3 Years

- State and Federal Income Tax Returns
- W-2
- 1099s
- Tax Deduction Receipts
- All Tax Supporting Documents
- Real estate Records & Other Tax Doc
- Mileage Records
- Canceled Checks
- Contracts
- Medical Bills/Statements

Hold 1 Month

- Bank Statements
- Deposit Slips
- Non-Deductible Receipts

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