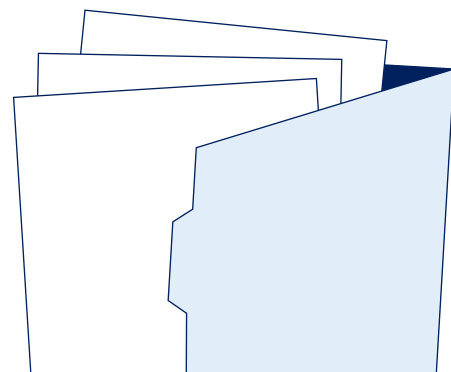


PAPER PURGE TIPS

DOCS TO SAVE & HOW LONG TO SAVE THEM



SAVE IT FOR SEVEN YEARS



- ➔ 1099s
- ➔ W-2s
- ➔ Bank deposit slips
- ➔ Bank statements
- ➔ Brokerage statements (year end)
- ➔ Cancelled check supporting tax deductions
- ➔ Charitable contribution documentation
- ➔ Credit card statements
- ➔ IRA nondeductible contributions
- ➔ Receipts or logs pertaining to tax records

SAVE IT FOREVER



- ➔ Divorce documents
- ➔ Estate planning documents (most recent version)
- ➔ Tax returns
- ➔ Retirement plan annual reports

SHRED IT



- ➔ Preapproved credit offers and applications
- ➔ Expired debit & credit cards
- ➔ Credit card statements and receipts
- ➔ Bank account statements and cancelled checks
- ➔ Paycheck stubs
- ➔ Utility and phone bills
- ➔ Investment account statements
- ➔ Insurance policy information and claims
- ➔ Expired passports & ID cards