

Organize Your Paperwork

SORT AND FILE YOUR PAPERWORK INTO SHORT TERM, LONG TERM, AND DISCARD FILES



LONG TERM PAPERS

- Appliance manuals, warranties, and service contracts
- Yearly bank statements
- Credit card contracts
- Legal documents
- Education records, diploma, transcripts, etc.
- Employment records
- Family health records, including vaccination histories
- Health benefit information
- Income tax papers (last 7 years only)
- Insurance policies
- Yearly loan statements
- Password list
- Receipts for items under warranty
- Safe deposit box inventory (and key)
- Tax receipts, such as those received for charitable deductions

SHORT TERM PAPERS

- Monthly bank statements
- Bill payment receipts
- Bills awaiting payment
- Monthly credit card statements
- Misc "To Do" papers

DISCARD

- Cancelled checks for cash or nondeductible expenses
- Expired warranties
- Pay stubs, after reconciling with W-2
- Income tax papers over 7 years old
- Monthly bills and statements over 12 months old