



# Document Management

## Cheat Sheet

### 1 Month

- Receipts
- Bank & Credit Card Statements
- Deposit Slips

### 7 Years

**Note: IRS Audits can be performed up to 6 years after filing**

- Tax Returns
- W2s & 1099s
- Receipts for Tax Deductible Items

### 1 – 3 Years

- Paycheck Stubs
- Checkbook Ledgers
- Mortgage Statements
- Business & Income Related Documents
- Product Warranties

### Forever

- Birth Certificates
- Marriage Licenses
- Divorce Records
- Social Security Cards
- Wills/Trusts
- Car Titles
- Loan Documents (for the life of the loan)
- Warranties (until expired)
- Pension/Retirement Documents
- Military Service Records

**Remember to shred any paperwork that personally identifies you, before recycling.**