

Task Checklist

PAPER ORGANIZING

living.



simplified.

90 DAYS OR LESS

ATM receipts | everyday receipts

ONE YEAR

bank statements | pay stubs
quarterly investment statements
utility bills

THREE YEARS

cancelled insurance policies
insurance paperwork | investment
statements | medical bills | records
of buying/selling a property
records of buying/selling stock

SEVEN YEARS

brokerage statements | business
and personal income tax returns
records of satisfied loans | social
security statements | tax return
documentation

WHILE ACTIVE

disputed property tax records
home improvement records
insurance documents | pension and
retirement plan records | personal
and business contracts | property
records | stock certificates | stock
records | warranties

INDEFINITELY

adoption papers | birth and death certificates | business license | green
cards | house deeds | ID cards | living wills | loan documents | marriage
licenses | mortgage documents | passports | pension plan documents
personal identification | powers of attorney | retirements statements
social security card | vehicle titles | wills

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Please note, items on this list may vary by state. Please check with your tax accountant or attorney.