

How Long to Keep it For Guidelines

1 MONTH
receipts (non-deductible items)
deposit / ATM slips
reconciled bank statements

1-3 YEARS
checkbook ledgers
paycheck stubs
mortgage statements
insurance records (expired)
charitable contributions
all business + income related documents
proof of deductible purchases
receipts for charitable donations

NOTES + THOUGHTS

AT LEAST 7 YEARS
state + federal income tax returns
w-2 + 1099s
medical bills + statements
contracts
receipts used as tax deductions
canceled checks
mileage records
real estate tax forms + records

FOREVER
birth certificates + passports
marriage / divorce papers
auto titles
mortgages
investment statements
home improvement receipts (for insurance)
wills
medical records
education records
pension + retirement plans
contracts + property agreements