

"Keep This" list of paperwork to keep safe

Keep these:

- ✓ Advance directive, wills, living wills, and powers of attorney
- ✓ Appraisals (collections, jewelry etc.)
- ✓ Birth and death certificates
- ✓ Business license
- ✓ Current insurance policies
- ✓ Divorce Decree(s)
- ✓ House deeds and mortgage documents
- ✓ ID cards and passports
- ✓ Marriage license
- ✓ Military Records (Branch of Service/dates and VA ID#)
- ✓ Passport/Citizenship Paperwork
- ✓ Pension plan documents
- ✓ Social security cards
- ✓ Vehicle titles and loan documents

Keep the most recent version of these:

- ✓ Annual insurance policy statements
- ✓ Retirement plan statements (401(k), 529, IRA, etc)
- ✓ Social security statements

Keep these as long as you own the item:

- ✓ Warranty documents with original receipt

This list is a "get started" guide. Of course, always check with your tax professional to confirm exactly what you need to keep. But this is a good start.