



GETTING ORGANIZED AT TAX TIME MAY SAVE YOU TIME AND MONEY

For many people, the approach of April 15th means a mad scramble to gather receipts, bank records and other papers needed to prepare their tax returns. Then, with the returns safely in the mail, they store their important papers in drawers, show boxes, and other spots - until the next tax season, when they scramble once again.

This year, why not break the habit of disorganization, and use tax time as an opportunity to permanently give order to your personal and financial affairs? In the case of papers and belongings that are valuable or irreplaceable, the best storage is in an Underwriters Laboratories (UL) classified fire-resistant storage container.



What *should* you put in your fire-protective container and how long should you store it?

Here are some Helpful Guidelines for the Most Common Documents:

DOCUMENTS



- Birth & Death Certificate
- Contracts
- Deeds
- Tax Records
- Bank & Credit Card Records
- Health Records
- Mortgage Loan Papers
- Insurance Policies
- Home & Property Inventory
- Marriage Certificate, Divorce, Custody, Adoption Papers
- Passport
- Stock & Bond Certificates
- Owner's Manuals, Warranties
- Wills

STORAGE TIME *

- Indefinitely
- 7 years after expiration
- Indefinitely
- At least 6 years
- 6 years
- Indefinitely
- 3 years after pay off
- 4 years after expiration
- Indefinitely (update)
- Indefinitely
- Indefinitely
- 4 years after sold
- As long as you own item
- Indefinitely

**Check with your attorney to verify storage times*

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