



GETTING ORGANIZED AT TAX TIME

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For many people, the approach of April 15 (or following business day) 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, shoe 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 it stay there?

Here are the guidelines for some of the most common documents:



CUSTOMER SERVICE

844.544.2752
cs@caltitle.com

SAN DIEGO

2365 Northside Drive, #250
San Diego, CA 92108
619.516.5227 | 800.542.6332
619.516.5249 FAX

ORANGE

28202 Cabot Road, #625
Laguna Niguel, CA 92677
949.582.8709 | 800.393.1892
949.582.2449 FAX

LOS ANGELES

100 North First St., #404
Burbank, CA 91502
818.382.9889 | 800.280.9131
818.380.0807 FAX

DOCUMENTS

SUGGESTED STORAGE TIME

Birth & Death Certificates.....	Indefinitely
Contracts.....	7 years after contract expires
Deeds	Indefinitely
Tax Records	At least 6 years
Bank & Credit Card Reports	6 years
Health Records	Indefinitely
Mortgage & Loan Papers	3 years after a loan is paid off
Insurance Policies	3 years from expiration date
Home & Property Inventory (purchase dates, serial numbers, etc.)	Indefinitely (update)
Marriage Cert., Divorce, Custody, Adoption Papers.....	Indefinitely
Passport	Indefinitely
Stock & Bond Certificates	4 years after sold
Owner's Manuals & Warranties	As long as you own the item
Wills.....	Indefinitely