



## Personal paperwork to keep

### To keep indefinitely:

- Birth certificate
- Cemetery deed
- Real estate title documents
- Death certificates
- Diplomas
- Guardianship arrangements
- Health records
- Immunisation records
- Marriage certificates
- Advance health directive
- Citizenship certificate
- Passports
- Powers of attorney
- Superannuation benefits
- Stock/bond certificates
- Vehicle titles
- Trusts
- Wills

### To keep for 1-3 months:

- Utility bills
- Sales receipts for minor purchases
- ATM receipts and bank deposit slips

### To keep for 1 Year

- Monthly mortgage statements
- Car insurance records
- Home and contents insurance records
- Expired insurance records
- Bank statements (unless online)

### To keep for five years (required by ATO):

- Payment summaries from payers, including your employer and the Department of Human Services
- Statements from your bank and other financial institution showing the interest you've earned
- Dividend statements from companies
- Summaries from managed investment funds
- Receipts or invoices for equipment or asset purchases and sales
- Receipts or invoices for expense claims and repairs
- Contracts
- Tenant and rental records.

Note: This is a general guide. For more information for your particular circumstances, please see your accountant or financial advisor.

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