

Women & Money

ARE YOU READY FOR CHANGE?

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[Insert CU name here]*



AMERICA'S
CREDIT UNIONS®

OBJECTIVES

- **Organize important papers**
- **Complete financial documents**
- **Tie up estate planning loose ends**
- **Review investment goals, risk tolerance**
- **Develop plan for financial independence**
- **Identify reliable resources**



FROM CHAOS TO CLARITY!



WHAT TO KEEP?

Credit card receipts/statements

Retirement/savings statements

Credit union records

Insurance policies

Paycheck stubs

Military records

House records

Tax returns

Receipts

Bills

Miscellaneous



HOW LONG TO KEEP IT?

45 days:

1 year:

7 years:

Length of
ownership:

Forever:

WHERE TO KEEP IT?

Carry with you



**Active, inactive files,
permanent records**



**Safe deposit box
or fireproof box**



Electronic

- USB drive
- Encrypted external hard drive
- Scan to electronic form

