

MULTIPLE CHOICE

Directions: CIRCLE the best possible answer to each question.

1. Which of these documents should you keep forever?
 - a. Investment statements
 - b. Credit card statements
 - c. Birth/death certificates and Social Security cards
 - d. Medical records

2. Which of these items should you toss after one year?
 - a. Pay stubs
 - b. ATM deposit and withdrawal slips
 - c. Investment statements
 - d. Tax returns and supporting documents

3. Which of these items should you toss after seven years?
 - a. Bank statements
 - b. Tax returns and supporting documents
 - c. Utility and phone bills
 - d. Medical records



QUIZ

Organizing Your Finances

NAME: _____

TOTAL
/ 3 pts

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