

8th Annual *Shred* Event!

Friday, August 7th | 9am - 12pm

Join us at Wealthquest for our **free** document shredding day! Bring us your paper clutter that should be properly destroyed and we'll make sure it's responsibly disposed of. We'll also be collecting select electronics for ethical recycling.

Paper to Shred

Shred when you **replace**

- Trust Documents (*when restated, not just amended*)
- Life Insurance Policies (*if cashed in or terminated*)
- Annuity Policy (*after cashed in or replaced*)

Shred when your document **ends**

- Warranty Documents & Receipts
- Insurance Policy - Auto & Home
- Loan Documents

Shred when you **get the next one**

- Social Security (annual)
- Insurance Policy (annual)
- Retirement Plan (end of year)
- Brokerage & Investment Statements (end of year)
- Utility Bills (monthly)

Shred when you **confirm the transaction**

- Bank Deposit Slips
- Credit Card Receipts
- Other Receipts (unless needed for warranty)

Shred after **one year**

- Pay Stubs
- Bank Statements
- Credit Card Statements
- Medical Bills (1 yr after payment or 7 yrs if tax deducted)

Shred after **seven years**

- Tax Return Preparation Documentation (W-2's, 1099's, etc.)

Electronics to Recycle

Desktop Computers

Laptops

Telephones & Cell Phones

Tablets

Cords & Remotes

Mice & Keyboards

Modems & Routers

LCD Screens & Monitors

Event Details

When:

Friday, August 7th

Time:

9am - 12pm

Location:

Wealthquest Front Parking Lot
50 E Business Way
Cincinnati, OH 45241



Delshire Elementary School

School Supply Drive!

August 7th | During the 8th Annual Shred Event

In conjunction with the Shred Event, Wealthquest is hosting a school supply drive for Delshire Elementary School. Each year, the students at Delshire Elementary School rely on generous donations of supplies to help equip them for a successful school year. Between now and August 7th, we will be collecting school supplies in the lobby of our Cincinnati office. Then, on August 7th, we'll have a separate bin to collect supplies from anyone that would like to support this initiative.

Wish List

Glue sticks

Packs of Copy Paper

Scissors
(round tip preferred)

Crayola crayons

Crayola colored pencils

Spiral notebooks
(70 page, wide ruled)

Pencils
(Ticonderoga, pre-sharpened preferred)

Dry-erase markers

Tissue Boxes

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*A donation bin will
be in the Wealthquest
lobby the month
leading up to the
Shred Event.*



WEALTHQUEST



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