ARCHIVES **OF ALBERTA**

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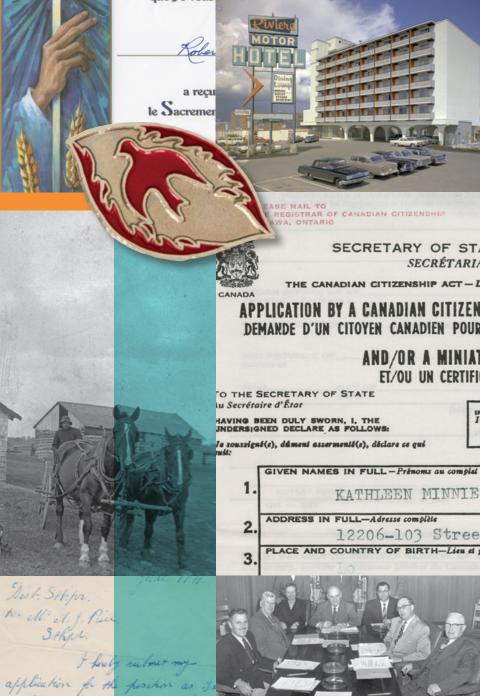
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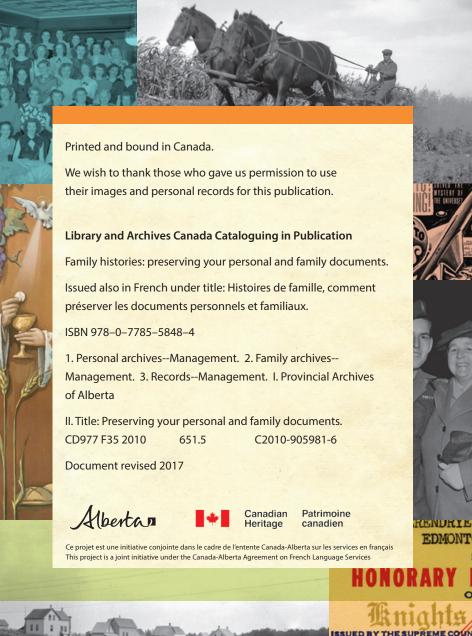
PRESERVING YOUR PERSONAL AND FAMILY DOCUMENTS

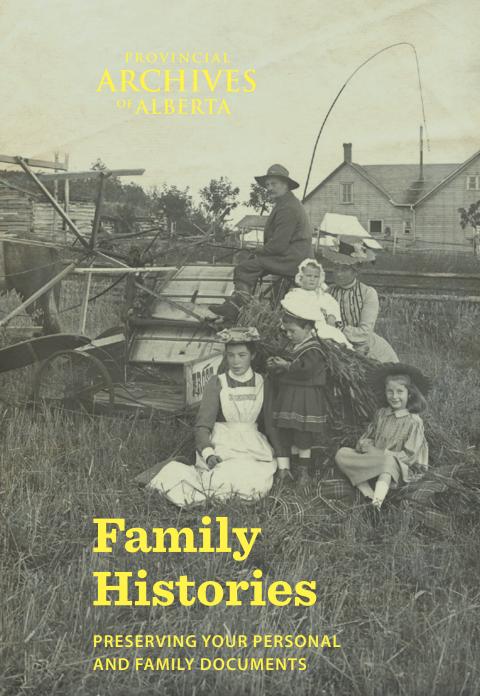


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Contents

- 7 Message from the Provincial Archivist of Alberta
- 9 Introduction
- 11 How to organize and maintain your documents
- **15** Retention: how long to keep your documents
- **17** Protecting personal information
- 19 Care and consideration of your permanent records
- 27 Consider donating your records to an archives

Personal

- 31 Identity and civil status
- **33** Education and training
- 35 Professional activities and employment
- 37 Leisure, entertainment, travel and social life

Family and Genealogy

41 Family and genealogy

Finances and Property

- 43 Finances, income and investment
- 47 Professional services
- 49 Housing and real estate
- **51** Personal property

Housekeeping

53 Housekeeping records



RED CHEVRON CLUB EDMONTON

27th Annual

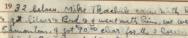
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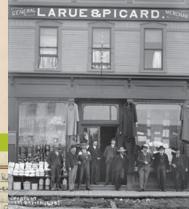
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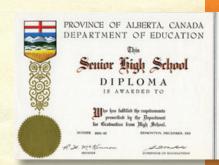
"What do I keep, what do I throw away, and what does the archives want?"

We are very pleased to present this guide to preserving family records. Years in the planning stage, it is only through the generous support of the Francophone Secretariat of the Government of Alberta, via a joint initiative with Canadian Heritage, that this resource could now be published in both English and French. A debt of gratitude is also owed to the information professionals that influenced the writing of the guide, as well to the Bibliothèque et Archives nationales du Québec, whose own guide Safely stored but not forgotten persuaded us that such a tool could also be created for the people of Alberta.

If you have any questions about what an archives can do to assist you, please contact your local archives, or the Archives Society of Alberta.

hestie latz.

Provincial Archivist of Alberta





KATHLEEN DENT

My warmest thoughts and best wishes to you on your 102nd Birthday



AIR CANADA

AC *A SMITH

EWR 9 MAY 07:48 TO: EDMONTON

1 QK 8633

CANADIAN GOVERNMENT **ANNUITIES**





Introduction

Everyone's life is unique, but many stories of our lives are found in the records we create and use: letters, diaries, photographs, scrapbooks, drawings, speeches, school diplomas, title deeds, income tax returns, professional files, records of political activity, records of community or sport involvement, birth and marriage certificates, wills, and even invoices and receipts.

We create, receive and keep records over the course of our lives. Some of these records are precious to us and our family; some have legal, financial or administrative value; and all seem to take over the available space in the house. How many of us have these in good order and at the ready if we need to produce them?

This guide is intended to help you select what records are worth keeping, and maintain an order to your records according to a very simple and clear system.

Disclaimer

The list of records in this guide is not exhaustive and the filing system presented here is only a suggestion. You might decide that other records not mentioned here are important for you to keep. The period of time to keep some records is based on federal, provincial and municipal legislation. The information in this guide does not have any legal authority and should not be quoted. For specific advice, please consult a legal or financial professional.



CANADIAN ASSOCIATION
OF
MEDICAL RECORD LIBRARIANS

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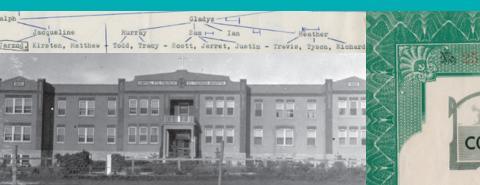
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How to organize and maintain your documents

Our system proposes four logical categories:

Personal

Family and Genealogy
Finances and Property
Housekeeping

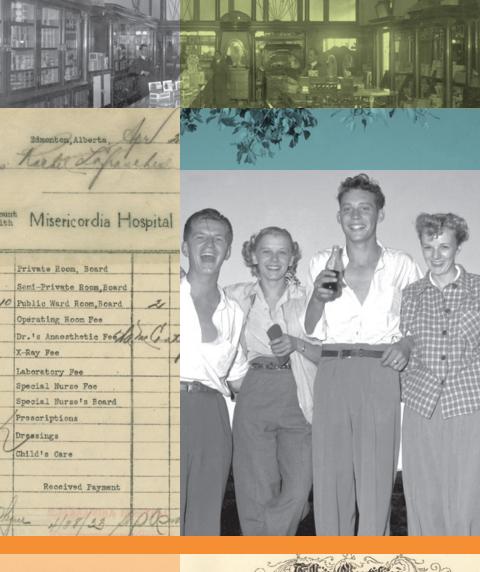
However, the categories can also be arranged alphabetically or by frequency of use. Some of the files will certainly be used more often than others as opposed to the records that you rarely reference (e.g. identity papers, employment related documents, income tax returns, etc.).

The organizing system we propose will be detailed later on and looks like this:

Identity and civil status
Education and training
Professional activities and employment
Leisure, entertainment, travel and social life
Family and genealogy
Finances, income and investment
Professional services
Housing and real estate

Housekeeping records

Personal property





said :- "Suffer little children to come unto Me." -- Luke 18: 16



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AUG	23-01	MTGPMT	*****237.91		*******21.54
AUG	24-01	PTBTRF		*****250.00	******271.54
AUG	27-01	PTBWDL	******20.00		******251.54
AUG	28-01	MTGPMT	******237.91		********13.63

There is no universal rule on what records a person or household should keep, just a few rules on how long some records should be kept, and lots of suggestions. Every household is different: your needs and interests will inform your recordkeeping. Any category previously mentioned can be divided into subcategories. For example, 'Finances, income and investment' can be further sub-divided into 'Income' related documents, 'Loan' related documents or 'Bank' related documents and so on. Or, you can create your own categories such as 'Correspondence', under which you can group family correspondence, social correspondence and professional correspondence. Once you have established a system, you should record it for future reference.

You can also use different colours of file folders for different categories. Consider arranging documents within each category by date, alphabetically or both, depending on the type of document.

The system you establish for paper documents can also be applied to the files on your computer. See some further suggestions regarding digital records in the Care and consideration of your permanent records section (page 19).



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MR AND MRS LESLIE DENT 12206 103 STREET EDMONTON ALTA TSC 2K1

AS YOU CELEBRATE A MOST SPECIAL DAY, I WANT YOU TO KNOW THAT YOU H MY WARREST COMMERTULATIONS. 65 YEARS TOGETHER IS AN IMPPIRIMG AND MEGATHARMING ACCOMPLISHMENT. MILB JOINS ME IN SEMBING YOU OUR VERY GOOD WISHES.





DOB: 03-MAY-1991 PHN: 24550-5330

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DTaP-IPV:Diphtheria, Tetanus, Pertussis, Polio dTap:Diphtheria, Tetanus, Pertussis MMR:Measles, Mumps, Rubella

CI

Retention: How long to keep your documents

Along with the classification system, a retention system is necessary so you can control the flow of documents and decide what to keep and what to discard and when. We will use the following categories:



Keep permanently

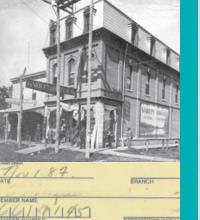
These are all documents you might need at some point or are of value to you or your family.



Keep until no longer needed

These are documents that after a certain time you no longer want or need to keep.





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CAPITALE SOCIALE L. 500.000.000 INTERAMENTE VERSATO

Protecting personal information

Many documents contain personal information

that can be used for identity theft. Bills have your contact information, receipts may show your credit or debit card numbers. These sensitive documents should be shredded or physically destroyed.

There might be personal information on your computer or on other electronic devices you use to store data, like memory cards, keys, compact discs and DVDs.

Before disposing of your hard drive or other information storage tools, physically destroy them or use formatting software to permanently erase all the files.

PERMIS D'ESSENCE et COUPONS DE RATION A 1040540

1943 1944



CATEGORY





Care and consideration of your permanent records

Records that you want to keep permanently

should be protected both from time's impact and from other destructive factors; all records should be kept in acid-free containers and off the floor. Some records are originals and are difficult, if not impossible, to replace if they are lost or destroyed. These should be stored in a safe place, such as a fireproof container or safety deposit box.

Keep records together by type of material: paper with photographs, and audio with video, as they require similar care conditions. Direct sunlight or fluctuations in temperature or humidity will shorten the lifespan of all types of records. The attic, barn, garage, basement and kitchen are not good storage places for your records. If a flood or disaster occurs, do not throw everything away; there are specialists who can recover wet materials if you act quickly.



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Hear ve! Hear ve!

Enemies of preservation

- Ultraviolet light (from sunlight and light bulbs)
- Extreme changes in temperature and humidity
- Dirt and dust
- Insects and rodents
- Poor quality paper products and adhesives
- Other physical and chemical contaminants (ink, rust, rubber bands, chemicals, plastics, paint fumes, dyes, cleaning products)

Friends of preservation

- Darkness
- Moderate, consistent temperature and humidity (reasonable storage conditions are close to 20°C and 45% relative humidity, but this varies with media)
- Protective archival envelopes, file folders and boxes



Security System Certificate of Installati

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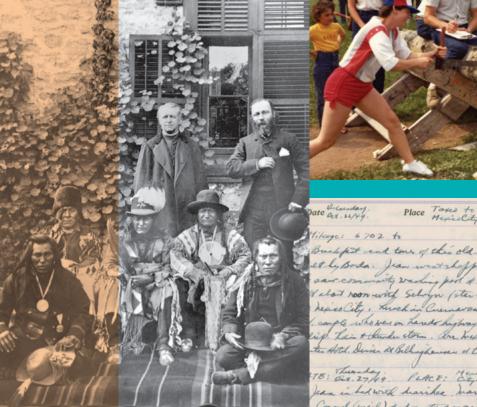
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Company: Bolt Security System Inc.

THE PROPERTY OF THE PROPERTY O COMMERCIAL ACTIVITY AT EXMONTON ARRIVAL OF A TRAIN OF 24 CARS CONSIGNED TO ONE OF THE WHOLESALE HOUSES

of Alberta, in Court Room Number 1, a Court House, in the City of Edmonton, Residential: (780) 484-277 Province of Alberta, on Monday, the 9 September, A.D. 1963, at ten o'clock tompany: Bott Security System Inc.

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Judge A. M. Dechene, as a Judge of the hat this system is complete and has been opera
Court of the District of Northern Alb



Date Oct . 26/49. Place Taxed to Mexico City Hilage: 6702 to Bushpet end tour of this old. et by Borda. Jean west shoft saw community washing pool of. I alor room with Selvyn (sterherico City, Knoch in Cuernavaa comple who were on hands highway

75: Ox. 27/19 PLACE: CE, Jean in had with draviles man

Digital materials are probably the most at risk.

Digital documents are information created, received, downloaded or stored in electronic form on a computer or other electronic storage device. This can include digital photographs, audio or video formats, emails and software- specific documents (files with extensions like .doc, .pdf, .tax). There are several hazards that threaten digital documents, including software or operating system obsolescence and the short lifespan of storage devices such as hard drives, CDs and DVDs. You should back-up your documents and transfer them periodically to a new storage device (every 3-4 years for CDs and DVDs, for example, and every 4-5 years for both internal and external hard drives). You might also print the important files, as high-quality acid-free paper can last hundreds of years.





For more detailed preservation information, go to the Provincial Archives of Alberta's website.

Preservation tips

- Only handle materials with clean hands.
- Use acid-free boxes, folders, dividers and envelopes;
 use PVC-free plastics but allow to breath.
- Use appropriately-sized containers; flatten documents and roll the extremely large ones, wrapping them in PVC-free plastic.
- Do not use metal paperclips or staples, rubber bands, adhesive tape, glue or 'post-it' notes on paper or photographs.
- Try to date and identify people, events and places in photographs; use a soft lead pencil such as 6B to write on the sleeve or the back of photos, on the edge rather than in the middle; if photos are written on, house them separately or divide them, otherwise they can be arranged with the image against the back of the next one; if in a scrapbook, consider writing next to the photos.
- Store home video and audio recordings at least eight inches away from the television, speakers or other electric/magnetic fields that can cause erasure; remove recording tabs and store vertically, completely rewound, away from UV rays; if magnetic media is dropped, information on it can be lost; identify the recordings.
- Store CDs and DVDs away from light and dust, vertically; do not flex them; do not write on or touch the recorded side, or place directly on another surface; do not use adhesive labels; mark them with special fine point markers.

Membership Certificate

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Canadian Blood Services Société canadienne du sang

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Consider donating your records to an archive

Records that you want to keep permanently could be offered to an archives. This guide is compiled from an archival perspective: archivists believe that the most complete record of a life is the most valuable. Not only should you keep your official records, your legacy is also comprised of unofficial documents, including those that show the highs and the lows of your history and your family's. Your records' value to present and future generations of researchers increases the more comprehensive your story is. Archives want you to donate records that you have kept over the course of your life, and those you consider important to you and your family, work and business. When it comes

to records you consider sensitive, remember you can always arrange for restrictions to be placed on them.

Please contact an archives before throwing your records away.

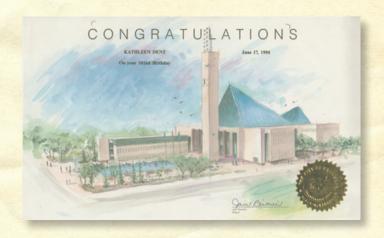




For a directory of archival repositories in Alberta, visit the Archives Society of Alberta's website.

Records that archives look for

Correspondence, diaries, photographs, scrapbooks, drawings, audiovisual recordings, architectural plans, maps, records of political, professional and organizational activities, records of community or sports involvement, business records. In other words, any material, including digital formats, that an individual created, used or received, and maintained during the course of a life.







CERTIFIED ABSTRACT

REGISTRATION OF MARRIAC

I Wereby Certify that the particulars of

JOSEPH MIVILLE DECH MARIA GARIBRY

EDEOBZON. er Occupation G.I.V.I.L. S.E.R.V.I.G.B. Age

Mother, MARIE PELLETIER Name in Full HARIA GARIEPY

ce of Birth MOSTREAL, QUEESO ... Spinst Age ______2S YEARS

es of Parents { Father. JOSEPH. HORRIDAS GARDERY | Mother E E U D I E E H E B D I S S O H H A | ne of Church or Occupier louse in which Marriage . ST. JOIGHDI'S ORTSON, cook place and Address

Sames and Residences J. H. GARTHEY, MUNICIPAL STREET L. DECKERS, MORINVILLE

Date of Marriage. ELETRITE day of

GOVERNMENT OF THE PRO DEPARTMENT OF HIGHWAYS MC

OPERATOR'S LICENSE

THIS IS TO CERTIFY THE

Affidabit of Execution of Will or Codicil by Subscribing Witness

JOSEPH MIVILLE DECHERE

In the District Court of the District of NORTHERN ALBERTA

late of the City of Edmonton, in the Province of Albertadeceased

3. ANNE GORDON

of the City of Edmonton in the Province of Alberta make oath and say: Stenographer

1. That on or about the 27th day of A.D. 1961 , I was personally present and did see the paper writing hereto annexed and now marked by me with my signature signed by the said Joseph Miville Dechene as the same now appears as and for (a) (b) his last Will and Testament, that the same was so in the presence of me and

signed by the said Joseph Miville Dechene Georges R. Brossesu Edmont-on Province of Alberta

Alberta Personal Health Card

Please protect your card.

Personal Health Number 77222-4451

In the Matter of the Estate of

Phillip Michel XXXXXX



WHOSE SIGNATURE APPEARS BELOW IS HERE A MOTOR VEHICLE SUBJECT TO CONDITIONS S

Identity and civil status

These are records that document who we are;

they also provide evidence of the legal arrangements that we have entered into and record significant events or situations in our lives. You might want to secure some of them in a safety deposit box or in a safe at home. These types of records should be organized according to individual family members.



Keep permanently

Certificates of birth, adoption, marriage and death.

Citizenship or immigration documents.

Contracts, agreements, decrees related to marriage, divorce and custody.

Wills and personal directives (the last updated), probates.

Records related to personal religious events (baptism, confirmation, exemptions).

Military papers (induction, release papers).



Keep until no longer needed

Driver's licence, passport, criminal record file.



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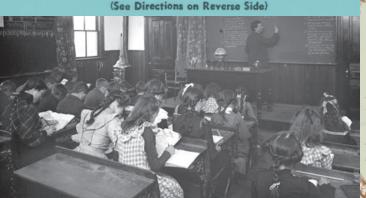






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THE UNIVERSITY OF ALBERTA-FACULTY OF EDUCATION STUDENT TEACHERS' PROGRESS REPORT







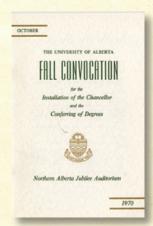
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Education and training

These records document your educational achievements and prove your credentials. These records should be kept for your lifetime.



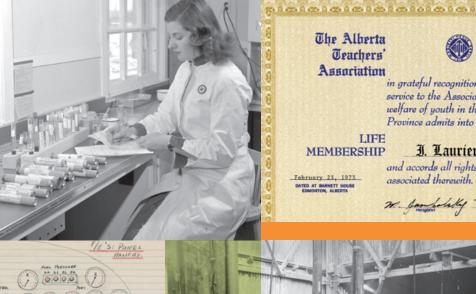
Keep permanently

Graduation, training or professional diplomas and certificates.

School yearbooks.

School records such as transcripts, convocation letters; optionally, keep evaluations and reports, samples of schoolwork and course notes.





The Alberta Teachers' Association



in grateful recognition service to the Associa welfare of youth in th Province admits into

LIFE **MEMBERSHIP**

I. Laurier and accords all rights associated therewith.

m. Jambolsky

RECORD OF EMPLOYMENT RELEVÉ D'EMPLOI

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18 Additional Monies Paid or Payable on or after Termination of Employment Autres sommes paydes ou payables au moment de la cassation d'emploi ou après

CANADIAN ASSOCIATION

Si vous remplissez le formulaire à la main, veuillez utiliser un stylo à bille, et bien appuyer.

MEDICAL RECORD LIBRARIANS CODE of ETHICS

for the

PRACTICE OF MEDICAL RECORD SCIENCE

is the duty of the members of the Canadian Associa Medical Record Librarians to remember:

Professional activities and employment

These are records that document your career and work-life through contracts, achievements, rewards and professional or social recognition.

Business records should be stored separately.



Keep permanently

Contracts, record of employment from past employers (originals and/or copies).

Licensing and copyright information for created works.

Awards and citations, reviews and articles, promotional material.

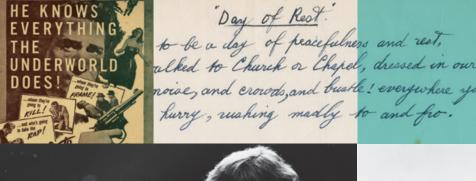
Research material, sketchbooks, scripts, manuscripts, speeches and/or lecture notes.

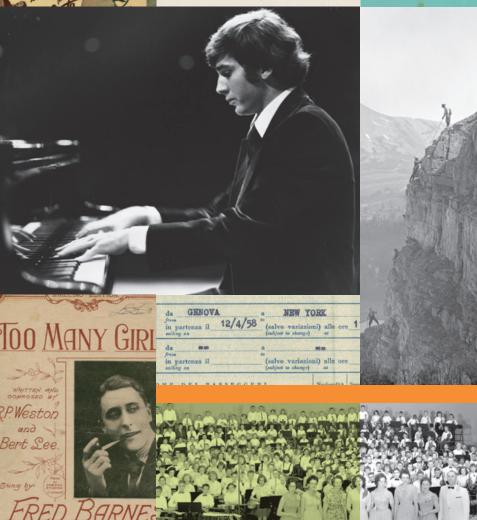
Certificates and permits, important correspondence from professional organizations of which you are a member.



Keep until no longer needed

Résumés, benefits, employer correspondence, professional handbooks.







Leisure, entertainment, travel and social life

These records relate to recreational and leisure activities, travel, creative activities and participation in societies or associations—all document non-work related activities. You can create subgroups of those activities in which you are more involved and that will generate steady accruals over time.



Keep permanently

Travel journals, photographs and memorabilia.

Programs of shows that you enjoyed.

Scrapbooks or personal cooking recipes or other original material you put together yourself.

Records documenting or rewarding your involvement in church activities, political organizations, community groups and volunteer associations (correspondence, minutes, photographs and awards).





Keep until no longer needed

Subscription agreements and membership cards for leisure activities (sports, clubs, etc.).

Hunting and/or fishing licences.

Travel documents (airline tickets, luggage stubs, reservations, etc.) and travel reward program records.

Note: keep until everything is cleared financially and any outstanding claims are resolved.





Family and genealogy

These are documents kept for sentimental reasons, of relevance to you, or files you would like your descendants to have access to in order to better know you and your family. This material also documents the story of your extended family, their memory and heritage.

These records should be preserved permanently for future generations; however if you are not selective (with photos, correspondence), duplicates can take up considerable storage space. Correspondence (e.g. letters, printed emails, even chat or other electronic messages) can be organized by subject/correspondent and by year. Even if stored separately, family slides and negatives, films, videos and audio recordings also belong in this category.



Keep permanently

Correspondence, personal diaries, manuscripts, greeting cards and invitations for special occasions.

Ancestors' birth, death and marriage certificates, their diaries, correspondence, photographs, biographies, stories and histories, and genealogy research.

Personal and family memorabilia and reminiscences. (Any record deemed of value for your family history.)

Photographs, photo albums, slides and negatives, films, videos and audio recordings.

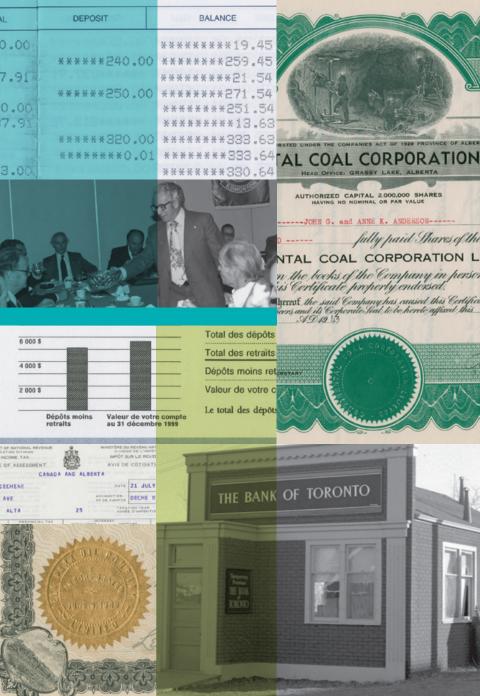


Finances, income and investment



As a general rule, you must keep tax returns and supporting documents for a minimum of six years. Seven years are recommended, after which older returns can be kept for reference and supporting documents can be destroyed. There is an exception for the receipts related to significant expenses, which should be re-filed in the proper category (home improvement, educational or health expenses, etc.) and kept as long as you think necessary.

Regular transaction receipts do not need to be kept after monthly credit or bank statements are verified. However, as a reference, you might want to maintain some of them with other related documentation in order to document proof of payment. Note that some of these are also supporting documents for income tax returns, so you might want to keep track of where you placed them; if they fit in two places, make a note in one place that they are in the other.





Keep until no longer needed

Income tax returns and supporting documents, claimed donation receipts, employment insurance documents, family and child benefits, pension plans/statements/annuities, cashed stocks.

Note: Keep for 7 years.

Loans discharge, bank account books.

Note: Keep for 6 years.

Returns-related statements of account and notices of assessment.

Statements of study loans, mortgages, lines of credit, personal loan documents.

Deposits and investment documents.

Life/health insurance and claims.

Savings plans, Registered Retirement Savings Plans (RRSP) documents, Registered Education Savings Plans (RESP) documents.

Cheque stubs or pay slips.

Note: Keep the last three if you apply for a loan or mortgage. Keep them all if you do not receive a T4 information return; in this case, you should file them as supporting documentation for your annual income tax return.



CASH SALES

TERMS NET 30 DAYS 2% ON OVERDUE ACCOUNTS

RECEIVED IN GOOD CONDITION

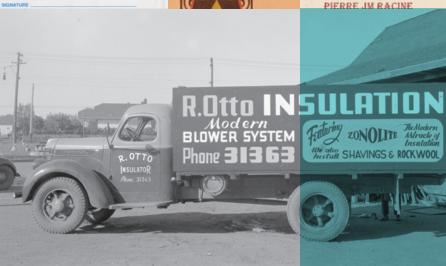
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P&C ELECTRICAL SERVICES LTD.

COMMERCIAL, RESIDENTIAL & MAINTENANCE

PIERRE JM RACINE



Modern
BLOWER SYSTEM Fathering ZONOLITE Alfracts of Institution Install SHAVINGS & ROCKWOOL



STORAGE DISTRIBUTION INVOICE

SACRED HEART HOSPIT

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19 days at \$ 2.50

Name

Address

MacCosham

Moving

.....days at \$ per day -

Professional services

Any documents related to professional services other than those related to housing or personal property should be kept here. You may organize them according to service/ professional, by year, or by family member. However, do not organize them by document type (e.g. 'Invoices', 'Warranties'). Some invoices may also be needed for income tax purposes.



Keep permanently

Health records other than invoices (medical history documents, vaccination history, test or examination results, etc.).



Keep until no longer needed

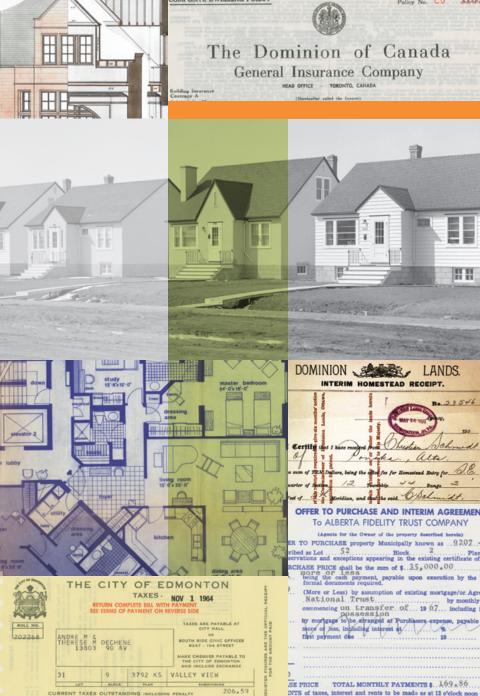
Contracts, statements and other documents related to utilities; invoices for dental, optical and other medical services; documents related to legal services.

Note: Keep for 3 years.

Documents related to beauty treatments; documents related to personal fitness coach.

Child care contracts, invoices and general information.

Documents related to landscaping and snow removal; bills; contracts for telephone, cable and internet; documents related to moving.



Housing and real estate

These records prove ownership, rights and duties, and trace the maintenance related to your real estate or home. Many of these documents should be passed to the new owner if you sell (work permits, warranties, plans, etc.). Some invoices may also be needed for income tax purposes.



Keep until no longer needed

Invoices for major repairs, additions or maintenance; plans and architectural drawings.

Note: Keep as long as you own the property.

Property records (titles, purchase and sale contracts); deeds (with covenants, conditions and restrictions); mortgage discharge papers.

Note: Keep 6 years after sale or last payment.

Leases, rental agreements and amendments; annual taxation and assessment documents; warranties for repairs, additions or maintenance; insurance contracts and claims; municipal permits for work on your property.



Personal property

These records also prove ownership, rights, and/or maintenance related to personal property and assets. It is best to group these files by goods (e.g. one file for car, one for furniture, one for appliances, etc.). As such, it is easier to discard them when you do not own the property anymore.



Keep until no longer needed

Purchase/rental contracts and receipts for valuable goods (required for warranty or insurance claims).

Insurance contracts and claims; certificates of warranty.

Household or personal property inventories.

Certificates of authenticity; invoices for repairs and maintenance; instructions for use and/or maintenance.

Note: Keep as long as you own the goods.

Registration documents.

Pet licence number and information; pet health and other pet related records.

Note: Keep as long as you own the pet.



Housekeeping records

You should have a 'transitory' file for housekeeping records that are used regularly in the course of your day. The material in this file is updated and purged monthly (after the end of current usage, discard or file in the other categories if pertinent). Always consider return policies before throwing out receipts.



Keep until no longer needed

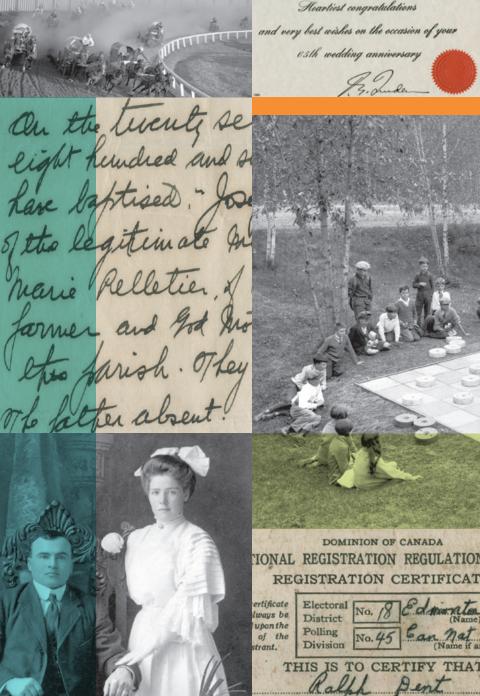
Contact information, addresses and phone numbers, business cards.

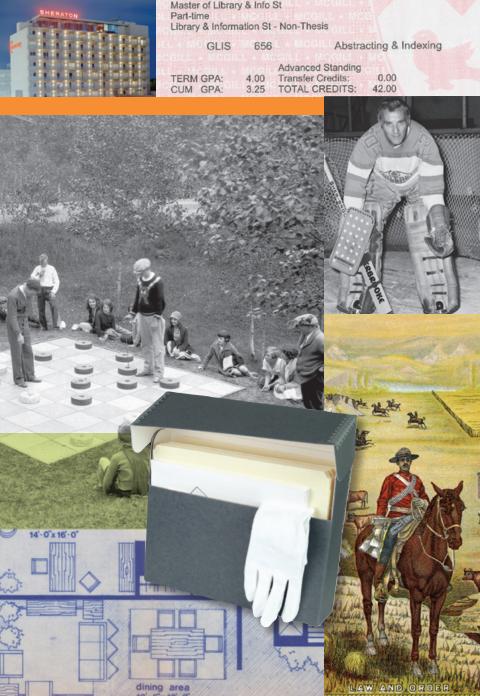
Theatre, concert, sports tickets; coupons and offers.

Library and/or video rental receipts.

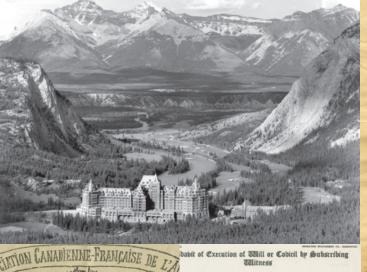
Bills to pay; stubs from dry-cleaning or repair shops; receipts (bank cards, credit cards, store, services, internet transactions); statements of banking operations.

Daycare or school contacts and friends list, including parents' info; school related information and newsletters; schedules.









DIPLÔME DE FRANÇAIS

EST DÉCERNÉ À

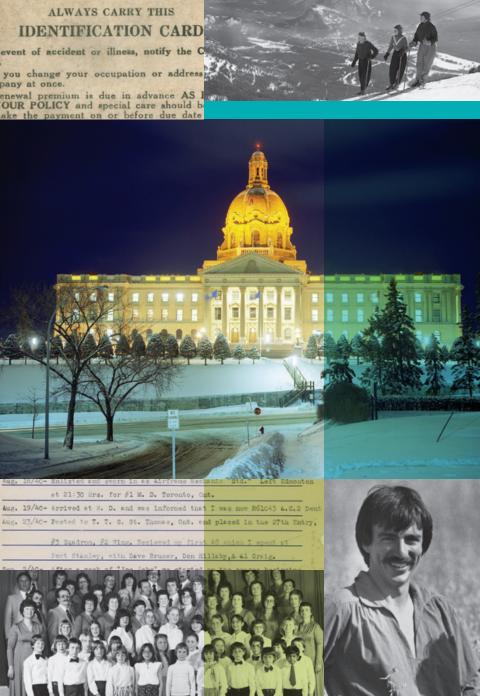
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Kathleen Dent

Heartiest congratulations best wishes on the occasion of ne hundred and second birthdi





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Name in Full

Place of Residence before

Place of Birth . MONTRRA

Age

Names of Parents | Father

Name of Church or Occup of House in which Marri



Hi Vimorku.

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