

Record Retention Guide for Individuals

Tax Return Copies	Permanently
Medical Receipts	7 years
Forms 1099 Received	7 years
Forms W2 Received	Permanently
401 K/Keogh Statements	7 years
IRA Statements (deductible & nondeductible)	7 years / Permanently
Loan Records / Forms 1098	7 years
Annuity Year End Statements	7 years
Insurance Policies – Life	Permanently
Insurance Policies – Other	7 years
Major Purchase Receipts	7 years
Year-end Brokerage Statements/Trade Confirmations	7 years
Certificates of Deposit Statements	7 years
Schedule K-1's from Partnership or S Corporation	7 years
House Records (cancelled checks for purchase of major improvements and maintenance)	Permanently
Birth and Death Certificates	Permanently
Medical Records	Permanently
Wills	Permanently
Trust Agreements	Permanently
Detailed List of Financial Assets Held	Permanently
Alimony, Custody or Prenuptial Agreements	Permanently
Military Papers	Permanently
Photos or Videotape of Valuables	Permanently