



## Financial Assets *(bank & investments, investments, etc.)*

	Bank Statements	6 years
	Deposit Receipts	6 years
	ATM Receipts	Account Reconciliation

## Residence & Real Estate *(personal & recreational)*

	Mortgage Documents	10 years
	Mortgage Statements	Life of Loan + 10 years
	Insurance	10 years
	Repairs & Contracts	10 years
	Warranty Information	Until the warranty expires

## Insurable Assets *(cars, jewelry, firearms, etc.)*

	Purchase Receipts	Life of Ownership + 3 years
	Insurance	Current Policies, Only
	Warranty Information	Until the warranty expires

## Earn *(employment, retirement, self-employed)*

	Paystubs, Monthly	Most recent 12 months
	Paystubs, Annual	7 years, minimum <i>(or until compare with SS Statement)</i>
	SS Statement	Most recent 3 years
	IRS Payroll Forms	Change jobs + 3 years

*You should consult your tax advisor, lawyer or banker for official recommendations. Our Financial Concierge provides the information in good faith and does not warrant its accuracy. It is provided for informational purposes only.*



# RECORD RETENTION CHECKLIST

## Owe (monthly bills, consumer debt, installment debt)

	Credit Card Statements	3 months, minimum (most current)
	Paid Bills	3 months, minimum (most current)
	Utility Bills	3 months, minimum (most current)
	Paid Promissory Note	3 years, minimum

## Identity

	Social Security Card	Indefinitely
	Birth Certificate	Indefinitely
	Marriage Certificate	Indefinitely
	Military Records	Indefinitely
	Death Certificate	Indefinitely
	Divorce Papers	Indefinitely
	Medical Records	Indefinitely

## Miscellaneous (historical, legal, proof of, etc.)

	Credit Report	3 years
	Audit Reports	Indefinitely
	Criminal Records	Indefinitely

## Sources of Information


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