

RECORD RETENTION: INDIVIDUALS

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TAX	
Tax Returns/Supporting Documents	6 years
Tax Payments	6 years
IRS or State Audit Reports	Permanently
FINANCIAL	
Pay Stubs	1 year
Bank Statements/Cancelled Checks	60 days (or 6 years if tax related)
Credit Card Statements/Receipts	60 days (or 6 years if tax related)
Wage Garnishments	6 years
Stocks/Bonds/Trade Confirmations	6 years (after sale)
Mortgages/Lease Agreements	6 years (beyond agrmt.)
Property Records (title/deeds)	Permanently
Retirement/Pension Plan Documents	Permanently
Insurance Policies	Life of Policy
OTHER	
Vital Records (birth/marriage/divorce/adoption/death)	Permanently
Legal (estate plans/wills/powers of appt./healthcare proxies)	Permanently
Military Records (enlistment contracts/proof of service)	Permanently
Medical Records	Permanently