

<b><i>ACCOUNTING RECORDS</i></b>	<b><i>RETENTION PERIOD</i></b>
Accident Reports and Claims	6 Years
Alimony, Custody of Prenuptial Agreements	Permanent
Bank Statements	3 Years
Birth & Death Certificates	Permanent
Certificates of Deposit Statements (After Maturity)	6 Years
Charitable Contributions	With Applicable Tax Return
CPA Audit Reports	Permanent
Detailed List of Financial Assets Held	Permanent
Forms W-2 Received	Permanent
House Records (Cancelled Checks for Purchase, Major Improvements & Maintenance)	Permanent
Insurance Policies (After Expiration)	Permanent
Investment Trade Confirmations	Permanent
IRA Records (Deductible & Nondeductible After IRA Termination)	Permanent
Legal Records	Permanent
Loan Records (After Loan Payoff)	6 Years
Major Purchase Receipts (After Purchase)	6 Years

Medical Bills (After Payment)	Keep With Tax Returns if Deducted
Medical Records	Permanent
Military Papers	Permanent
Photos or Videotape of Valuables	Permanent
Real Estate Documents	3-6 Years After Property is Disposed of & Taxes Paid
Retirement & Pension Records	Permanent
Schedule K-1's From Partnerships or S Corporations (After Disposition of Interest)	6 Years
Tax Return Copies (After Filing)	6 Years
Trust Agreements	Permanent
Wills	Permanent
Year-End Brokerage Statements (After Securities Deposit)	6 Years

**NOTE:** Documents establishing basis of trade, business or investment assets, or taxpayer's principal residence should be retained for six (6) years beyond the date of the filling of the tax return for the year in which the asset was disposed.