



Record Retention Schedule for Individuals

ITEMS	RETENTION SCHEDULE
Tax Return Copies	7 years after filing
Medical Bills	7 years after payment
Forms 1099 received	7 years after receipt
Keogh Statements	7 years after Keogh termination
IRA Records (deductible & non-deductible)	7 years after IRA termination
Loan Records	7 years after loan payoff
Insurance Policies	7 years after expiration
Major Purchase Receipts	7 years after purchase
Year End Brokerage Statements	7 years after security deposit
Schedule K-1's (partnerships or S corp)	7 years after disposition of interest
House Records (canceled checks for purchases, major improvements, maintenance, etc.)	Permanent
Birth & Death Certificates	Permanent
Medical Records	Permanent
Wills	Permanent
Forms W-2 received	Permanent
Trust Agreements	Permanent
Financial Assets – Detailed List	Permanent
Alimony/Custody/Prenuptial Agreements	Permanent
Military Papers	Permanent
Photos or Videotapes of Valuables	Permanent