

## **Document Retention**

### **Documents**

### **Length of Time**

<b>Taxes</b>	<b>7 years</b>
<b>IRA contributions</b>	<b>Permanently</b>
<b>Retirement/Savings plan statements</b>	<b>Quarterly until annual</b>
<b>Bank records - canceled checks</b>	<b>1 year unless high importance</b>
<b>Brokerage statements</b>	<b>Until they are sold</b>
<b>Bills - unless needed to prove value (keep)</b>	<b>1 year in general</b>
<b>Credit card receipts and statements</b>	<b>3 months</b>
<b>Paycheck stubs</b>	<b>1 year</b>
<b>Home or living records and receipts</b>	<b>6 years</b>
<b>Legal records, medical directives, power of attorney</b>	<b>Permanently</b>
<b>Medical history</b>	<b>Permanently</b>
<b>ATM receipts</b>	<b>Until appear on bank statement</b>
<b>Home Insurance</b>	<b>5 years</b>
<b>Life Insurance Policies</b>	<b>Duration of policy plus 3 years</b>
<b>Utility Bills</b>	<b>3 months</b>

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