

Document Retention

Documents

Length of Time

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

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