



Records to Retain Permanently

Birth Certificates
Adoption Records
Military Records
Marriage Records
Divorce Records
Custody Agreements
Naturalization Papers
Copy of Tax Returns

Records to Retain Indefinitely (Seven years beyond date asset is sold or fully collected)

Real Property purchase and sale documents
Real Property improvement documents
Other Property Basis Documentation
Retirement Plan Records (IRAs, 401(k)s, Pensions, etc.)
Investment Records (including annual broker statements)
Insurance and Other Contract Records
Invoices and Documentation for Valuable Assets

Records to Retain for Seven Years

W-2s, Forms 1099, and Schedule K-1s
Other documentation of Income Received
Documentation of items deducted on tax returns
Mortgage Forms 1098
Documentation to support credits claimed on tax returns