

THE AGUIAR GROUP

Record Retention

OCTOBER 2010

November is a good time to think about all the paperwork that has been accumulating in your home. Below is a list to help you know which records you need to keep and for how long.

Individual Records	Retention Period (In years)
Medical Bills, Forms 1099 received	6 (after filing)
Keogh statements	6 (after Keogh termination)
IRA records	6 (after IRA termination)
Loan records	6 (after loan payoff)
Insurance policies	6 (after expiration)
Major purchase receipts	6 (after purchase)
Year-end brokerage statements	6 (after securities deposit)
Certificates of deposit statements	6 (after maturity)
Schedule K-1's from partnerships or S corporations	6 (after disposition of interest)
House records (Closing documents, cancelled checks for purchase, major improvements and maintenance)	Permanent
Birth and death certificates, Military papers, Medical records, Wills, Trust agreements	Permanent
Tax return copies, Forms W-2 received	Permanent
Detailed list of financial assets held, Photos or videotape of valuables	Permanent
Alimony, custody or prenuptial agreements	Permanent

Important Dates

Oct 15 – Extended Deadline to File Personal Tax Return

If you filed an extension on your taxes, your return must be post marked on or before October 15th.

Oct 23– Organize and Shred

Use this day to go through all those papers lying around, comparing to our list on the front, and deciding what can be shredded. Remember, we are more than happy to take your old documents and shred them for you!

Oct 31 – Halloween

Trick-or-Treat! Mix in some healthy snacks with traditional favorites when passing out goodies.

Note to Self:

Be sure to keep documentation on charitable donations that have been made.

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