

# LOCATION LIST OF DOCUMENTS

Indicate where each of the following records are stored. For items that you keep in a safe deposit box, you may want to keep a copy in your household files.

Document	Location Original	Location Copy	How Long to Keep
<b>Automobile Records</b> (titles, registration, repairs)			For as long as you own vehicle(s)
<b>Appointment Books</b> (past)			1-10 years, depending on if used for tax records, reference or memorabilia
<b>Bank Statements &amp; ATM Slips</b>			Standard is 6 years for tax purposes
<b>Bank Account</b> (opening statements)			As long as you own account
<b>Credit Card Statements</b>			Standard is 6 years if tax-related purchases on statements; otherwise until annual interest statement is issued by company
<b>Credit Report</b>			As long as current
<b>Dividend payment records</b>			Until annual statement is supplied by company, then just annual statements
<b>Family historical information and negatives of important photos</b>			Permanently
<b>Household inventory &amp; appraisals</b>			As long as current
<b>Insurance Policies</b> (auto, homeowners, liability)			As long as statute of limitations in the event of late claims
<b>Insurance Policies</b> (disability, medical, life, personal property, umbrella)			As long as you own
<b>Investments</b> (purchase records)			As long as you own
<b>Investments</b> (sales records)			Standard 6 years for tax purposes
<b>Lease and loan agreements, loan payment books</b>			As long as under term
<b>Medical Records</b>			Permanently
<b>Military Records</b>			
<b>Mortgage or loan discharge</b>			As long as you own, or six years after discharge
<b>Receipts</b> (Appliances, art, antiques, collectibles, home improvements, household repairs, major purchases)			As long as you own items
<b>Receipts</b> (Clothing, Food)			
<b>Resume</b>			As long as current
<b>Vital Documents</b> (Adoption Papers, Birth Certificates, Citizenship papers, Marriage certificate, Death certificate, Divorce decrees, Passports, Patents & copyrights, Stock & bond certificates)			Permanently
<b>Tax Records</b> (bank statements and cancelled checks, deposit slips, contracts, charitable contributions, credit card statements, income tax returns, medical bills, pension plan records, pay stubs)			Current year, plus six prior years
<b>Will</b>			As long as current