

KEEPING IMPORTANT DOCUMENTS



Document	How Long To Keep	Where To Keep
Automobile Records (titles, registration, repairs)	As long as you own the car	Title & registration: in your glove box. Repairs: Filing cabinet.
Bank Statements & Cancelled Checks	One year	Filing cabinet Better: PDF format on computer
Birth Certificates	Forever	Important Document File Box
Contracts	Until expired or updated	Filing cabinet Better: PDF format on computer
Credit Card Statements	Maximum 6 years if there is tax-related purchases on the statement (kept with your tax paperwork); otherwise, until your statement is reconciled	Filing cabinet Better: PDF format on computer
Dividend Statements	Annual Statement – 3 years	Filing cabinet Better: PDF format on computer
Divorce Papers	Forever	Important Document File Box
Home Purchase & Improvement Records	For as long as you own the house or are rolling over profits from it into a new property	Important Document File Box
Household Inventory	As long as you own or until your inventory list is updated	Important Document File Box
Insurance, Life	Forever	Important Document File Box
Insurance, Care, Home, Etc.	Until updated	
Investment Records	Until cashed or sold	
Investment Certificates	Until cashed or sold	
Loan Agreements	Until updated	
Marriage License	Forever	
Medical Records	Until updated; include list of meds taken daily, contact list of all doctors, dentists, specialists	
Military Service Records	Forever	
Receipts for Large Purchases	Until sold or discarded	
Service Contracts & Warranties	Until sold or discarded	
Social Security Card	Forever	Important Document File Box
Tax Returns	6 years from filing date	Important Document File Box
Will, Trust, Power of Attorney, Advance Health Care Documents	Until updated	Important Document File Box; Fire safe, or safe deposit box at Bank – copies on file with attorney

This chart gives you some general guidelines as to how long you need to keep your important documents. Please check with your lawyer or accountant for more specific details.