



How Long Should You Save Records?

Have you wondered how long to hold on to your important documents?

Below is a list of suggested ways to store these documents and the recommended amount of time to keep them on hand.

Type of Record	Holding Period	Recommended Storage
Property Records: Mortgages, Fidelity National Title escrow instructions and Fidelity National Title insurance policy records, deeds, loan agreements, photos and ID numbers of valuables.	As long as you own the property plus several more years as proof of paid off loans.	Originals in a safety deposit box; copies at home.
Family Papers: Birth, marriage and death certificates, divorce and settlement papers, military discharge papers, adoption papers, school transcripts and diplomas.	Indefinitely.	Safety deposit box.
Health Records: Copies of forms showing immunizations, hospital stays, operations.	Indefinitely.	Home files.
Government Documents: Social Security card, passport.	Indefinitely.	Card in a safe place. stub in safety deposit box. Passport in a safety deposit box until needed.
Estate Materials: Wills, trusts, burial instructions.	Indefinitely.	Originals with lawyer; copies and inventory in safedeposit box
Tax Records: Returns and supporting documents.	Seven years (required by the government).	Home files.
Home Improvement Records: Receipts, contracts and records of costs.	Until home is sold and tax liability is settled.	Home files; copies in a safety deposit box.
Warranties, Guarantees: Contracts and proofs of purchase.	As long as you own the items.	Home files.
Insurance Records: Policies and household inventory, including photos and appraisals of valuables.	Until four years after expiration of policy. Update inventory annually.	Original policies at home; copies and inventory in a safety deposit box.
Investment Records: Securities, buy and sell orders, cancelled checks, statements and contracts for retirement plans.	At least three years beyond sale for tax purposes. Retirement materials indefinitely.	Certificates in safe-deposit box, copies at home.
Bank Account Records: Cancelled checks, registers, statements, receipts.	Certificates of Deposit (CD's) until maturity. Others as long as needed for related tax matters.	CD's and list of accounts in a safety deposit box. Ledger books and checks at home.
Credit Account Records: List of cards, records of payment	Until obligation is discharged; longer to support tax matters.	Home files.
Master lists of assets and liabilities: Record of financial accounts, property owned, insurance coverage taxes.	Update Annually.	Home files. Copies in a safety deposit box.
Safe-Deposit box inventory:	Indefinitely. Update as contents change.	Home files.

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