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| <b>Residential Records Including:</b><br>Escrow statements for purchase and/or sale; receipts for improvements; mortgage & refinancing loan documents   | At least 4 years after the property is sold               |
| <b>Investment Records:</b><br>Purchase and sale records on securities<br>Notifications regarding splits, reinvested dividends, etc.   | At least 4 years after the security is sold               |
| <b>Depreciation Records:</b><br>For any real estate or depreciable business property: <ul style="list-style-type: none"> <li>• Cost (Escrow statement, if real property)</li> <li>• Date acquired</li> <li>• Depreciation claimed in prior years</li> <li>• Receipts for major improvements</li> </ul>  | At least 4 years after the property is disposed of        |
| <b>Retirement Plans:</b><br>Keep records of retirement plan contributions, including non-deductible IRA deposits, employer stock plans, roll-overs and KEOGH/SEP plan contributions or withdrawals  | 4 years after plan assets have been paid out or withdrawn |
| <b>Insurance Policies &amp; Household Inventory:</b><br>Including photos and appraisals of valuables  | 4 years after expiration of policy                        |
| <b>Tax Return Supporting Documents:</b><br>All tax return supporting documents such as: <ul style="list-style-type: none"> <li>• Bank statement / cancelled checks</li> <li>• Credit card statements</li> <li>• Medical and contribution receipts</li> <li>• Business entertainment records</li> <li>• Self-employed business records, including contracts, employment records, deposit records, paid invoices, financial statements and payroll tax reports</li> </ul> | 6-7 years   |
| <b>Income Tax Returns - Client Copy</b>   | Indefinitely  |
| <b>Family Records:</b><br>Birth, marriage and death certificates, divorce & settlement papers, military discharge, adoption papers, school transcripts and diplomas   | Indefinitely (In secure place like safe deposit box)      |
| <b>Health Records:</b><br>Immunizations, hospital stays and operation records   | Indefinitely  |
| <b>Estate Materials:</b><br>Wills, trusts, burial instructions  | Indefinitely - Update regularly                           |
| <b>Safe Deposit Box Inventory</b>   | Indefinitely - Update regularly                           |
| <b>Property Records:</b><br>Including costs, depreciation schedules, appraisals, plans and blueprints   | 4 years after purchase                                    |
| <b>California Use Tax:</b><br>Invoices from purchases made over the internet, by mail, or by phone order where no California sales or use tax was paid  | 4 years after purchase                                    |