



METZ LEWIS

ATTORNEYS AT LAW

Personal Client Services

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INDIVIDUAL RECORD RETENTION GUIDELINES

The following chart provides a general guideline for the retention of many individual records, but the specific holding periods for any record retention should be given careful scrutiny based on your specific circumstances.

Permanent

- Stock/mutual funds purchases (until sold)
- House records: cancelled checks for purchase, major improvements and maintenance
- Birth, marriage and death certificates
- Medical records
- Wills/Trust Agreements
- Forms W-2 received
- Detailed list of financial assets held
- Alimony, custody or prenuptial papers
- Military papers
- Photos or videotape of valuables

6 Years

- Tax return copies (after filing)
- Correspondence/Notices from Internal Revenue Service or any state and local tax authorities
- Casualty/theft loss documentation
- Tax related cancelled checks and receipts
- Medical bills (after payment)
- Forms 1099 received (after receipt)
- Keogh statements/IRA records, deductible & nondeductible (after termination)
- Loan records (after loan payoff)
- Insurance policies (after expiration)
- Major purchase cancelled checks and receipts
- Year-end brokerage statements (after securities deposit)
- Stock/mutual funds purchases (after sale)
- Certificate of deposit statements (after maturity)
- Schedule K-1s (after disposition)

You should check with your attorney regarding record retention for unusual circumstances.

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