



THAYER FINANCIAL

DOCUMENT RETENTION GUIDE

A REFERENCE TO DECIDE HOW LONG TO KEEP IMPORTANT DOCUMENTS.

FINANCIAL DOCUMENTS	RETENTION PERIOD
RETIREMENT PLAN BENEFITS	PERMANENTLY
STUDENT LOANS	10 YEARS AFTER REPAYMENT
LOAN AGREEMENTS & STATEMENTS	10 YEARS AFTER REPAYMENT
ANNUITY CONTRACTS	UNTIL ANNUITY IS PAID OUT
BANK STATEMENTS	7 YEARS
CREDIT CARD STATEMENTS	7 YEARS
INVESTMENT ACCOUNT STATEMENTS	7 YEARS AFTER LAST SELL
STOCK / BOND CERTIFICATES	WHEN SOLD
SOCIAL SECURITY STATEMENT	UNTIL YOU RECIEVE A NEW ONE
CREDIT REPORT	UNTIL YOU RECIEVE A NEW ONE

PERSONAL PROPERTY DOCUMENTS	RETENTION PERIOD
HOME IMPROVEMENTS	7 YEARS AFTER SALE
REAL ESTATE PURCHASES	7 YEARS AFTER LAST SELL
VEHICLE TITLES	WHEN SOLD
WARRANTIES	WHEN SOLD OR EXPIRED
VEHICLE REGISTRATION	WHEN SOLD
HOUSEHOLD INVENTORY	KEEP UPDATED
INSURANCE POLICIES	A YEAR AFTER REPLACING POLICY
PROPERTY TAX ASSESMENT	UNTIL YOU RECIEVE A NEW ONE
VEHICLE REPAIRS	UNTIL YOU RECIEVE A NEW ONE
SAFE DEPOSIT BOX INVENTORY	KEEP UPDATED

ESTATE PLANNING DOCUMENTS	RETENTION PERIOD
CEMETERY DEED	PERMANENTLY
LETTER OF LAST INSTRUCTION	AFTER WRITING A NEW ONE
TRUSTS	KEEP UPDATED
WILL	KEEP UPDATED

PERSONAL & TAX DOCUMENTS**RETENTION PERIOD**

ADOPTION PAPERS	PERMANENTLY
BIRTH CERTIFICATE	PERMANENTLY
CITIZENSHIP PAPERS	PERMANENTLY
DEATH CERTIFICATES	PERMANENTLY
DIVORCE DECREE	PERMANENTLY
GUARDIANSHIP	PERMANENTLY
LAWSUITS	PERMANENTLY
MARRIAGE CERTIFICATES	PERMANENTLY
MILITARY DISCHARGE	PERMANENTLY
NATURALIZATION CERTIFICATION	PERMANENTLY
SOCIAL SECURITY CARD	PERMANENTLY
TAX RETURN & SOURCE DOCUMENTS	7 YEARS AFTER FILING
PASSPORT	UNTIL EXPIRATION
POWER OF ATTORNEY	KEEP UPDATED

CAREER & EDUCATION DOCUMENTS**RETENTION PERIOD**

DIPLOMAS	PERMANENTLY
EDUCATION TRANSCRIPTS	PERMANENTLY
VETERAN'S PAPERS	PERMANENTLY
EMPLOYEE BENEFITS	CHANGE JOBS
EMPLOYMENT CONTRACT	CHANGE JOBS

MEDICAL DOCUMENTS**RETENTION PERIOD**

HEALTH RECORDS	PERMANENTLY
IMMUNIZATION RECORDS	PERMANENTLY
MEDICAL DIRECTIVE	KEEP UPDATED

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