

# Individual Income Tax Return Supporting Documents

Keep with your 1040 tax return until: **7 years after filing date**



## Record Retention Guideline

### Shred:

- ATM withdrawal receipts
- Sales receipts for minor purchases

### 1 Year

- Paystubs until current year tax return is complete
- Bank and credit card statements, unless tax related

### 7 Years

- Tax returns
- Supporting documentation including W-2s, 1099s, proof of income and tax deductions

### Indefinitely

- Nondeductible contributions to a traditional IRA until you make a complete withdrawal/distribution
- Record of stock purchases until sold, plus three years
- Records related to purchasing your home and major home improvements as long as you own the house, plus three years
- Legal documents including wills, trust documents, estate plans, divorce decrees and proof of dependents
- Birth certificates, expired passports

Pella, IA \ Urbandale, IA \ Altoona, IA \ Mt. Ayr, IA \ Bethany, MO \ Stanberry, MO

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