



### **SHRED:**

- :: ATM receipts and deposit slips after they've been reconciled with your bank statement
- :: Monthly and quarterly bank statements if year-end statements are received

### **KEEP (3 YEARS):**

- :: Income-related documents, such as invoices, cash register tapes, credit card charge slips, bank deposit slips, 1099s and W2s
- :: Proof of deductible purchases and expenses, such as receipts, invoices, cancelled checks, mileage logs, and credit card slips or statements
- :: Receipts for charitable contributions

### **KEEP (6 YEARS):**

- :: The IRS recommends keeping filed state and federal tax returns for six years
- :: Payroll records

### **KEEP INDEFINITELY:**

- :: Partnership documents
- :: Contractual agreements, such as vendor relationships, marketing, or commission and royalty structures
- :: Property records, including intellectual property, for as long as you own the asset plus three years after year of the tax return that includes its sale
- :: Deeds and titles