

Reduce your chance of becoming an identity theft victim by properly shredding your personal and business documents. Southside is pleased to provide you with the following records retention suggestions for shredding your important documents.



Personal Records Retention Suggestions*

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| Bank statements/cancelled checks | 6 Years |
| Birth certificates | Permanent |
| Canceled stock and bond certificates | 7 Years |
| Correspondence – legal and important matters | Permanent |
| Credit card statements | 6 Years |
| Custody agreements | Permanent |
| Death certificates | Permanent |
| Divorce papers | Permanent |
| Employment taxes for household employees | Permanent |
| Home and home improvements | 7 Years |
| Insurance policies (expired) | 4 Years |
| IRA contributions | Permanent |
| Marriage certificates | Permanent |
| Retirement and pension records | Permanent |

Business Records Retention Suggestions**

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| AR ledgers | 7 Years | Invoices to customers, from vendors | 7 Years |
| GL final reports | Permanent | Journal vouchers | 7 Years |
| Bank statements/cancelled checks | 7 Years | Miscellaneous internal reports | 3 Years |
| Cancelled checks for taxes | Permanent | Board Minutes | Permanent |
| Capital stock and bond records | Permanent | Notes receivable | 7 Years |
| Contracts and leases expired | 7 Years | Patents, Trademarks | Permanent |
| Deeds, mortgages, contracts and leases | Permanent | Payroll records, Time cards | 7 Years |
| Depreciation schedules | Permanent | Personnel files (terminated) | 7 Years |
| Employment applications | 3 Years | Petty cash vouchers | 3 Years |
| Employment taxes (records and returns) | Permanent | Physical inventory tags | 3 Years |
| Financial statements – year end | Permanent | Purchase orders | 7 Years |
| General Ledger | Permanent | Requisitions | 1 Year |
| General correspondence | 3 Years | Sales records | 7 Years |
| Insurance policies (expired) | 4 Years | Subsidiary GL ledgers | 7 Years |
| Internal audit reports, working papers | 3 Years | Tax returns and worksheets | Permanent |

*Consult with your legal or financial advisor to confirm your specific needs.
**Consult with your legal, financial, HR department and records manager to confirm your specific needs and requirements.