

TAX PERMANENT FILE CONTENTS-INDIVIDUAL

1040 Returns and Schedules

Basis for mortgage interest computation

Closing documents for purchase / sale of a residence

Copies of gift / estate tax returns

Divorce decree / separation agreement

Estate planning documents

Wills / Trust documents

Qualified plan documents

Buy / sell agreements

Basis of stocks and mutual funds

Form 8606- nondeductible IRA contributions

Form 2119