



Shred event—Saturday, May 18, 2024

The Farmington branch invites you to shred your documents—and your concerns. Please bring your personal documents for secure shredding. (See back for guidelines.)

Date and time:

Saturday, May 18, 2024 | 9 a.m.–1 p.m.
Rain or shine

Location:

Parking lot of RBC Wealth Management

(look for the Iron Mountain
Shredding truck)

30 Batterson Park Road, Suite 350
Farmington, CT 06032

Note that documents may not be dropped off prior to the event to be shredded during the event, nor given to someone to shred for you.

Contact office associate Karen Haines at karen.haines@rbc.com or (860) 703-6603 with any questions.



**Wealth
Management**

Investment and insurance products offered through RBC Wealth Management are not insured by the FDIC or any other federal government agency, are not deposits or other obligations of, or guaranteed by, a bank or any bank affiliate, and are subject to investment risks, including possible loss of the principal amount invested.

Secure document shredding provided by Iron Mountain

THERE WILL BE NO ELECTRONICS RECYCLING.

NO PLASTIC BAGS, BINDERS OR LARGE PLASTIC BINDER CLIPS.

Type of record	How long to keep?
Copies of old tax returns	Keep copies along with supporting documents for seven years. The IRS has three years to find good-faith errors, but they have six years to cite you for under-reporting income.
Credit card statements	Shred them as soon as your payment is posted unless your statement contains: charitable contributions (six years), mortgage or insurance payments (as long as you own your home), major purchases like cars, computers or expensive electronics (for home insurance and warranty records). If you use online access, statement copies are provided online.
Bank statements	Basically, the same as credit card statements. You can shred monthly bank statements as soon as you've reviewed them for accuracy. But keep copies of canceled checks related to charity, insurance and mortgage payments, or other tax-related items like checks to the IRS. If you use online access, copies of checks and statements are provided online.
Bills	Shred after your payment is posted. However, if you take a home office deduction on your tax return, keep them for six years. Keep bills for big-ticket items such as furniture, cars, expensive jewelry and appliances for as long as you own them in case you ever have to file an insurance claim.
Brokerage statements	Keep monthly statements until you receive the yearly summary. You can shred monthly statements once you're sure they match your yearly summary statement.
Pay stubs	Keep for one year until you receive your December pay stub or W-2. You can shred the monthly stubs as soon as you've received the December stub and verified the W-2.

Document shredding services are provided by a third party, which is solely responsible for the ultimate destruction and disposal of documents and RBC Wealth Management makes no warranty, express or implied, regarding the services provided by the third party, or the adequacy of the destruction or disposal of the documents.

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24-HK-01386 (04/24)