

Records Retention Schedule

Logic

- Contact your accountant and/or attorney for recommended record retention application to your association, taking into consideration local, state and federal laws as well as your organization's needs.
- Adopt the retention record as a policy so that the board does not have to handle regular questions about what to save and toss.

| Description | Retention Period |
|---|------------------|
| | # of Years |
| (Partial Listing) | |
| Advertising Rates, Slicks, Information | |
| Antitrust Record (Last presented on ____) | |
| Awards | |
| Backgrounder/Fact Sheet | |
| Benefits Information | |
| Board List/Labels | |
| Bylaws/Articles of Incorporation | |
| Calendars of Events | |
| Call for Papers | |
| Career Information | |
| Chapter Information | |
| Committees | |
| Con't. Educ. Information | |
| Convention | |
| Corporate Documents | |
| Credit Bureau Report | |
| Elections/Nominations | |
| Financial Reports | |
| Fundraising | |
| Hotel Histories | |
| Insurance | |
| IRS - Letter of Determination | |
| IRS Correspondence | |
| Job Description | |
| Laws and Rules | |
| Legislation - Historical | |
| Legislation - Upcoming Session | |
| Local Chapter Info | |
| Logos/Graphics | |

| Description | Retention Period |
|--|------------------|
| Membership Brochure | |
| Mgmt. Contract or Performance Evaluations | |
| Meeting Minutes | |
| Mission Statement | |
| National Affiliation Information | |
| News Articles (on industry dated no more than 12 months unless VERY important) | |
| Newsletters Archive (or in notebooks) | |
| Photos | |
| Potential Advertiser/Exhibitor | |
| Press Releases | |
| Previous Management | |
| Strategic Plan | |
| Tax Returns - Federal | |
| Tax Returns - State | |
| Trade Press List | |
| Other | |
| Other | |
| Other | |
| Other | |
| Other | |