

Previously Compiled Client Books

Indefinitely

Electronic Correspondence

Email

7 years

Other Electronic Correspondence

Indefinitely, unless no longer applicable

Programs

- Notices/Promotional Materials (electronic or hard copy)
 - Final Version Indefinitely
 - Draft Until Program is complete
- Meeting Registrations At the end of the Current Programming Year
- Meeting Handouts
 - Hard Copy (if applicable) 1 year
 - Electronic 5 years
 - Website Indefinitely
- Evaluations/Survey Results
 - Hard Copy (if applicable) Current programming year
 - Electronic (individuals) Current programming year
 - Electronic (summary of results) Indefinitely
- Sponsor Logos 3 years
- Meeting Attendees and Prospects
 - Database 3 years
- Product Show Attendee List or Registrant List
 - Electronic or Hard Copy (if applicable) 3 years
- Meeting Attendance Lists 3 years

Membership

- Member Surveys (electronic or hard copy)
 - Individual responses 1 year
 - Summary of results Indefinitely
- Chapter Newsletter
 - Compiled version (electronic) Indefinitely
- Advertisements or Logos 3 years
- Membership Lists
 - Database Monthly
- Raw excel data 3 years
- Plaques and Trophies Indefinitely

Accounts Payable

- Original Invoices (electronic or hard copy) 7 years

Accounts Receivable

- Invoice Register (electronic) 7 years
- Deposit Records (electronic or hard copy) 7 years

- Bank Statements (electronic or hardcopy) 7 years
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- Tax Records/IRS Correspondence (hard copy) 7 years

General Finance

Financial Reports/Financial Statements/Budgets Indefinitely

Photographs

- Electronic Indefinitely

Board

- Strategic Plan Indefinitely
- Minutes/Agendas
hard copy Current Board year
electronic Indefinitely
- Board of Directors Lists with Contact Info Indefinitely

General Industry Information

- (electronic or hard copy) 1 year unless still applicable

Legal Correspondence

- (electronic or hard copy) 2 years or until no further action is required

Corporate Papers

- Articles of Incorporation Indefinitely
- Charter Indefinitely
- Constitution & Bylaws Indefinitely

Insurance

- Policies 8 years