

**Previously Compiled Client Books** Indefinitely

**Email Correspondence** 7 years

**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
- 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
- Tax Records/IRS Correspondence (hard copy) 7 years

**General Finance**

Financial Reports/Bank Statements/Budgets

Indefinitely

**Photographs**

- Electronic

Indefinitely

**Board**

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

Indefinitely

Current Board year

Indefinitely

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
- Charter
- Constitution & Bylaws

Indefinitely

Indefinitely

Indefinitely

**Insurance**

- Policies

8 years