Records Retention Policy

Previously Compiled Client Books
Indefinitely

Email Correspondence
7 years

Programs
- Notices/Promotional Materials (electronic or hard copy)
  Final Version
  Draft
Indefinitely
  Until Program is complete
- Meeting Registrations
  At the end of the Current Programming Year
- Meeting Handouts
  Hard Copy (if applicable)
  Electronic
1 year
  5 years
- Evaluations/Survey Results
  Hard Copy (if applicable)
  Electronic (individuals)
  Electronic (summary of results)
Current programming year
  Current programming year
  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
  Summary of results
1 year
  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  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