

Sample Document Retention & Destruction Policy

1) *The following documents will be kept on file by the organization for the period of time listed below:*

<i>Articles of Incorporation</i>	<i>Permanent</i>
<i>Audited year-end financial statements</i>	<i>Permanent</i>
<i>Board of Directors Meeting Minutes</i>	<i>Permanent</i>
<i>Bylaws (original & all amendments)</i>	<i>Permanent</i>
<i>Year-end investment statements</i>	<i>Permanent</i>
<i>Commonwealth of PA Charitable Registration</i>	<i>Permanent</i>
<i>IRS Form 990 or 990-EZ</i>	<i>7 years</i>
<i>Bank statements, cancelled checks</i>	<i>7 years</i>
<i>Annual Roster of Board Members</i>	<i>Permanent</i>
<i>Operating Budgets</i>	<i>7 years</i>
<i>Event Budgets</i>	<i>7 years</i>
<i>Allocation & Grant Records</i>	<i>10 years</i>
<i>Contributors Lists</i>	<i>7 years</i>
<i>Vendor Files (contracts, invoices, payment records)</i>	<i>10 years</i>

2) *To facilitate future destruction, records will be stored with a pre-determined destroy date to avoid further reviewing materials prior to destruction.*