Sample Retention Schedule

Provided by Community Financials

Sample Retention Schedule ABC Association

Annual Reports 2 years Permanently Articles of Incorporation Pars Permanently As-Built Specification Plans Permanently Assessment Information 1 year 7 years Assessment Information 1 year 7 years Assessment Status 1 year 7 years Budget 1 year 9 Permanently Cancelled Checks and Bank Statements 1 year 9 Permanently Cash Disbursements Journal 1 year 7 years Contracts 1 year 3 years Contracts 1 year 3 years Correspondence: Legal and Contract 1 year 3 years Correspondence: Legal and Contract 1 year 9 Permanently Duplicate Opposit Tickets 1 year 9 Permanently Duplicate Opposit Tickets 1 year 9 years Federal Income Tax Returns 3 Years 9 Permanently Duplicate Opposit Tickets 1 year 7 years Federal Income Tax Returns 3 Years 9 Permanently Monthly Financial Statements 1 year 7 years General Journals 1 year 9 Permanently Insurance Policies 1 year 7 years Goneral Journals 1 year 9 Permanently Insurance Policies 1 year 7 years Supply Invoices 1 year 7 years Supply Invoices 1 year 7 years Supply Invoices 1 year 7 years Deads 9 Permanently Mailing lists 1 year 7 years Part 1 year 9 Permanently Mailing lists 1 year 9 Permanently Mailing lists 1 year 7 years Part 1 year 9 Permanently Mailing lists 1 year 7 years Part 1 year 9 Permanently Mailing lists 1 year 7 years Part 1 year 9 Permanently Mailing lists 1 year 7 years Part 1 year 9 Permanently Mailing lists 1 year 7 years Part 1 year 9 Permanently Mailing lists 1 year 7 years Part 1 year 9 Permanently Mailing lists 1 year 7 years Part 1 year 9 Permanently Mailing lists 1 year 9 Permanently Ma	File Name	Current File	Storage
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Excerpt from Community Association Institute (CAI) GAP Report on The Role of the Board Secretary