Retention Schedule

Retention Schedule	Dept.	Item	Retention Period (legal)	Retention Period (Business Purpose)	Retention Location			
	all	correspondence, general	7 years	7 years	6 Bedford Green			
		correspondence, legal	permanent	permanent	6 Bedford Green			
	Corporate Records	Articles of Incorporation	Permanent	Permanent	6 Bedford Green			
		bylaws	permanent	permanent	6 Bedford Green			
		Board Resolutions	Permanent	Permanent	6 Bedford Green			
		Board and Committee agendas and materials	7 years	7 years	6 Bedford Green			
		Board and committee minutes	Permanent	Permanent	6 Bedford Green			
		Board and Committee Conflict of Interest Disclosure forms	7 years	7 years	6 Bedford Green			
		Board and Trustee files	7 years after term of service	permanent	6 Bedford Green			
		IRS Exemption Determination application and related materials	permanent	permanent	6 Bedford Green			
		Policies and Procedures	until suspended	until suspended	6 Bedford Green			
	Communications	annual reports	7 years	Permanent	6 Bedford Green			
		other publications	7 years	permanent	6 Bedford Green			
		photos	7 years	permanent	6 Bedford Green			
		Press Releases	7 years	permanent	6 Bedford Green			
		research reports/surveys	N/A	permanent	6 Bedford Green			
	Development	fund agreements (signed) and correspondence related to terms of the fund	permanent	permanent	6 Bedford Green			
		Legacy Files	life of donor, then merge to fund files	life of donor, then merge to fund files	6 Bedford Green			
		Trust Agreements and related correspondence	7 years after termination of trust	permanent	6 Bedford Green			
	Finance	accounts payable invocies	7 years	7 years	6 Bedford Green			
		bank reconciliation	7 years	7 years	6 Bedford Green			
		Bank Statements	7 years	7 years	6 Bedford Green			
		Cash Receipts log	7 years	7 years	6 Bedford Green			
		Check register	7 years	7 years	6 Bedford Green			
		Contacts, leases and afreements	7 years after obligation ends	7 years after obligation ends	6 Bedford Green			
		equipment files	7 years	7 years	6 Bedford Green			
		financial statements, work papers and auditor management letter	Permanent		6 Bedford Green			
		Insurance policies, claims and accident reports	permanent	permanent	6 Bedford Green			
		investment performance reports	7 years	permanent(year end)	6 Bedford Green			
		ledgers (accounts payable, accounts receivable, general ledger, journal entries, chart of accounts)	7 years	7 years	6 Bedford Green			
		Payroll Records	7 years	7 years	6 Bedford Green			
		Tax Returns	7 years	7 years	6 Bedford Green			
	Human Resources	ISR-Form I-9	1 years after end of service	1 years after end of service	6 Bedford Green			
		Retirement Plans	permanent	permanent	6 Bedford Green			
		Employment applications and resumes	3 years	3 years	6 Bedford Green			
		employee handbook	permanent	permanent	6 Bedford Green			
		employee personell files	permanent	permanent	6 Bedford Green			
	Programs	Grantee Records(approved and declined)			6 Bedford Green			
		CNCS Financial Grant Records			6 Bedford Green			
	Technology	Email	N/A	3 months	6 Bedford Green			
		software licenses and manuals	until superseded	until superseded	6 Bedford Green			