

## Central Missouri Chapter of ARMA International

### Records Retention Schedule



**KEY** (all numbers represent years)

Abbreviation	Meaning
ACE	After Contract Expires
COA	Completion of Audit
CY	Current Year
LOC	Life of Chapter
PERM	Permanent
US	Until Superseded
*	Historical records, including records no longer created by the Chapter, may be stored at the Western Historical Manuscript Collection (WHMC)

RECORD SERIES	RETENTION PERIOD	OFFICE OF RECORD	UNOFFICIAL COPY
<b>EDUCATIONAL AND MEMBER ACTIVITIES</b>			
Conference Proceedings* (1 copy of brochure and attendee roster)	PERM	President	
Contracts	10 years	President	Treasurer
Membership Lists*	US	Secretary	
Program Planning Records	FY + 3	President	
<b>FISCAL</b>			
Bank Statement	FY + 5	Treasurer	
Cancelled Checks	FY + 5	Treasurer	
Deposit Slips	FY + 5	Treasurer	
Financial Statement (Form 990)	PERM	Treasurer	President
<b>RECORD SERIES</b>			
General Ledger	FY + 5	Treasurer	
Invoices – Paid	FY + 5	Treasurer	
Receipts	FY + 5	Treasurer	
Treasurer’s Report*	FY + 5	Treasurer	
<b>ORGANIZATIONAL</b>			
Awards*	PERM	President	
Board Meeting Agenda	FY + 1	President	
Board Meeting Attendees – List	FY + 1	President	
Board Meeting Minutes*	PERM	Secretary	
By-Laws*	PERM	Secretary	Webmaster
Certificate of Records Destruction	LOC	President	Vice President
Charter (1987)*	PERM	Secretary	
Constitution*	PERM	Secretary	
Correspondence <sup>1</sup>	FY + 1	All Board Members	
Historical Records Inventory*	US	Secretary	
Photos <sup>2</sup> and Scrapbooks*	PERM	Secretary	
Procedures	US + 5	Secretary	
Records Retention Schedule	US + 5	Secretary	President
Website (annual snapshot)	US	Webmaster	

1- Board member correspondence may be destroyed at the discretion of the Board member as long as it is retained for the minimum retention.

2 – One copy of photos should be given to the Chapter Secretary to file. A selection of photos will be sent to WHMC.