

DOCUMENT RETENTION

Electronically Stored Documents

Electronically stored documents (e.g., in pdf, text, or other electronic format) comprising or relating to a particular document otherwise addressed in the Schedule should be retained for the same period as the document which they comprise or to which they relate, but may be retained in hard copy form (unless the electronic aspect is of significance).

Electronically stored documents considered important to the Chapter or of lasting significance should be printed and stored in a central repository (unless the electronic aspect is of significance).

Permanent

Electronically stored documents not included in either of the above categories

Two Years

Insurance

Insurance Claims Records

Permanent

Legal and Contracts

Contracts, related correspondence and other support documentation
Legal Correspondence

10 Years after Termination

Permanent

Management and Miscellaneous

Strategic Plans
Disaster Recovery Plan
Policies and Procedures Manual

7 Years after Expiration

7 Years after Replacement

Current version with revision history

Property—Real, Personal and Intellectual

Real Property Leases
Personal Property Leases
Trademarks, Copyrights and Patents

Permanent

10 Years after Termination

Permanent

Tax

Tax exemption documents & correspondence
IRS Rulings
Tax Returns

Permanent

Permanent

Permanent

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Pacific Northwest
Co-Treasurer

J. Vergara
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