

RETENTION SCHEDULE – revised February 3, 2016

Documents - State		How Long to Keep (Minimum)
Articles of Incorporation, amendments bylaws		Permanently
Certificate of incorporation and corporate records to the state		Permanently
Tax Returns		Permanently
Work sheets and related backup documents for tax returns		7 years
Minutes		Permanently
Annual corporate reports		Permanently
Insurance policies (including expired policies)		Permanently
Insurance letters/correspondence		Permanently
Audit reports of CPAs and financial statements		Permanently
Bank statements and reconciliations		7 years
Canceled checks for standard transactions		7 years
Invoices from vendors		7 years
Business correspondence		3 years
Historian Records		Permanently
Convention Records:	Planning Committee	2 years
	Registration packet & summary	7 years
Applications:	Best of the Best	2 years
	WAVE	2 years
	Winner of Awards	5 years
List of Award Winners and Organizations		Permanently
Committee minutes:	Best of the Best	5 years
	WAVE	
	Strategic Planning	
Reports - State Officers	President	3 Years
	PPE	
	CHE	

Documents – District (retained by District Chair unless otherwise specified)		How Long to Keep (Minimum)
1	District By-laws and Amendments	Permanently
2	District chair Reports to Partners of WHA - Written and Statistical	3 years
3	District Chair Spring/Fall Reports to District	3 years
4	District Honor Points Reports	2 years
5	District Rotation Lists: District Meeting Hosts and Nominating Committee	3 years
6	Roster of District Officers	Permanent
7	District Newsletters	3 years
8	Local Presidents' Reports	3 years
	Local CHE Reports	
	Local PPE Reports	
	Local Newsletters	
9	Spring Regional Meeting Materials	2 years
	Fall District Meeting Materials	
10	District Treasurer's Reports (Treasurer keeps) (checkbook, bank statement, receipts, etc)	7 years
11	District Budgets (Treasurer keeps)	7 years
12	District Minutes (Secretary keeps)	10 years
13	District CHE Reports to Partners of WHA including the	2 years
14	District PPE Reports to Partners of WHA including the	2 years

Permanent Records, 4 years or older, must be stored at WHA Headquarters