

## RECORDS RETENTION SCHEDULE

While it is important to retain the historical records of each Assembly, it is not necessary to indefinitely store every scrap of paper! Below is a general listing of records each Assembly should handle during the course of a year and a suggested retention schedule. If other records should be added to this schedule, please notify the Supreme Officer.

The purpose for keeping most records is for reference. For example, the forms used for last year's Grand Assembly registration may be helpful to the Advisory Board Member who will be assisting the Assembly registration this year, but keeping them for ten years is unnecessary!

CARE should be taken when transferring Assembly information from one Mother Advisor to another - particularly in light of the fact so much of our work is now done electronically. Some of these records may also need to be transferred.

<u>DESCRIPTION OF RECORD</u>	<u>RETENTION PERIOD</u>
Assembly By-Laws Book which is signed by Initiates -----	INDEFINITELY
Applications for Initiation, Demit, Affiliation, Notice of Suspension -----	INDEFINITELY
Assembly Recorders' Books (minutes) -----	INDEFINITELY
Assembly Treasurers' Books -----	INDEFINITELY
Assembly Annual Report to Supreme Assembly -----	INDEFINITELY
Grand Cross Listing/Record -----	INDEFINITELY
 Advisory Board Minutes -----	 5 years
 Service Hour Reports -----	 5 years
<i>(may be helpful when the Advisory Board makes Grand Officer and Grand Cross recommendations)</i>	
 Assembly Calendars, Installation Programs etc. -----	 3 years
Inventory Reports -----	3 years
Financial Statements -----	3 years
Assembly Bank Statements -----	3 years
Audit Reports -----	3 years
 Grand Assembly Registration Forms -----	 2 years
 Purchase Orders for supplies -----	 through the current audit
Treasurer's Receipts -----	through the current audit
Recorder's Orders -----	through the current audit

Correspondence such as Installation Invitations, etc. ----- one month following the event for reference; some of these items may be placed in the Assembly's scrapbook.

### RECORDS AND SUPPLIES WHICH SHOULD BE DESTROYED BY THE MOTHER ADVISOR OR GRAND DEPUTY:

- OUTDATED Gold Books
- OUTDATED Supreme Statutes and By-laws
- OUTDATED Rituals