

**Unitarian Universalist Church of Davis
RECORDS RETENTION POLICY**

*Adopted by the Board of Trustees in September, 2006
Revised on May 13, 2013*

Document destruction should occur upon expiration dates.

PERMANENTLY	LOCATION
Articles of Incorporation, Amendments, Bylaws _____	Administrative Office
Certificate of Incorporation _____	Administrative Office
Prior years' annual filings with the Secretary of State _____	Administrative Office
Tax returns _____	Storage Closet + Administrative Office
Board meeting minutes _____	Library Archive
Annual reports and annual audit reports _____	Library Archive
Documentation of real estate and building improvement transactions _____	Administrative Office
Bequest records _____	Administrative Office
Copies of records from planned giving receipts _____	Administrative Office
Expired insurance policies _____	Storage Closet + Administrative Office

SEVEN YEARS	LOCATION
Mortgages paid in full _____	Administrative Office
Worksheets used to prepare tax returns _____	Administrative Office
Bank statements and reconciliations _____	Storage Closet + Administrative Office
Vendor invoices and contracts _____	Storage Closet + Administrative Office
W-2 and 1099 copies _____	Administrative Office
Housing allowance documentation _____	Administrative Office
Special fund-raising appeals records _____	Storage Closet + Administrative Office
Congregational contribution records _____	Storage Closet + Administrative Office
Miscellaneous government reports filed (unless otherwise mandated) _____	Storage Closet + Admin Office

THREE YEARS	LOCATION
General invoices and check copies _____	Storage Closet + Administrative Office
Employee personnel records (after termination) _____	Storage Closet Safe

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