

*Sample Table for Association Records Retention (OR)**

This policy outlines how long certain Association records will be maintained. At the end of the retention periods described herein, the Association will destroy all copies of the described records.

Type of Record	Retention Period	Confidential?
Member Lists	Permanent	No
Member Contact Information (Emails, Phone Numbers)	Permanent	Maybe
Director/Officer Lists	Permanent	No
Deeds, Plats, Maps	Permanent	No
Building Plans	Permanent	No
Governing Documents & Amendments (CC&R's, Bylaws, Articles of Inc.)	Permanent	No
Resolutions/Rules (current)	Permanent	No
Resolutions (superseded)	3 years	No
Architectural Guidelines	Permanent	No
Board Meeting Minutes	Permanent	No
Association Meeting Minutes	Permanent	No
Committee Meeting Minutes	3 years	No
Committee Reports	3 years (permanently if incorporated into minutes)	Maybe
Meeting Notices and Agenda	3 years	No
Proxies and Ballots	1 year	Maybe (if secret ballots were used)
Budgets	10 years	No
Financial Statements	7 years	No
Accounts payable/receivable ledgers	3 years	No

General Ledgers	3 years	No
Bank Statements/Cancelled Checks	3 years	Yes
Tax Returns	7 years	No
Audits	3 years	No
Invoices	3 years	Maybe (legal invoices may have privileged information)
Owner Ledgers/Billing Records	10 years	Yes
Contracts (current)	10 years	No
Contracts (completed)	10 years	No
Bids-not accepted	3 years	Maybe
Correspondence (General to membership)	3 years	No
Correspondence (important/legal)	10 years	Maybe
Court Filings/Pleadings	3 years (uncollected judgments should be kept for 10 years)	Maybe
Accident Reports and Claims	3 years beyond statute of limitations	Maybe
Insurance Policies	Maintain Declarations pages of expired policies for 20 years	No

**This is simply an example. Your records retention policy should be specific to your Association's needs.*