



WRSSAR RECORD RETENTION POLICY

It is the policy of WRSSAR:

1. To retain all documents and records of the Society as long as necessary to comply with State and National regulations.
2. To minimize permanent storage to the extent possible by including important papers and documents in bound Year-Books or the bound books of Approved Applications.
3. To back-up routinely essential computer files and to retain back-up copies for 1-2 years off-site. (Currently, only the Treasurer, Registrar and Awards Chairman are likely to have such computer files.)
4. To destroy or return copies of documents of a personal nature submitted to support a membership application after the application has been either approved or in effect, permanently rejected.

Application of policy

Annual reports prepared by officers and committee chairmen should include minutes, tables and correspondence clearly having long term importance to the Society. Those annual reports and the attachments thereto should be included in the annual Year Book. (Historian's responsibility)

Financial records and reports essential for tax purposes should usually be retained by the Treasurer for seven years. Generally those files should be destroyed on the 8th year.

Application copies should be bound and permanently retained by the Registrar. Any documents of a personal nature which support an application should either be returned to the applicant when he becomes a member or shredded.

Corporation records (e.g. incorporation papers, Certificate of Continuing Existence, By Laws, Regulations, IRS Letter regarding 501(c)(3) status and TIN, etc.) should be permanently retained by the Secretary.

Working files The officers and committee chairmen should be retained in their "officer" or Committee files **only** those documents and reports needed for carrying out their responsibilities including the training of a successor. None of these files should be retained permanently.

Adopted by the WRSSAR Board of Trustees on January 3, 2012