

Record Retention Schedule

FOR RELIGIOUS ENTITIES



APPLIED
IMAGING

Keep for 1 Year

- Monthly/quarterly reports
- Request for reimbursements & expenses
- Priesthood recommendations
- Membership. data

Keep for 5 Years

- Bank statements
- Cancelled checks
- Tax reports
- Payroll. from date of termination

Keep for 7 Years

- Financial records
- Documentation that may be required for tax audits
- Employment records (from date of termination)

Keep for 10 Years

- Annual contribution statements
- Invoices for equipment
- Check stubs

Keep for 15 Years

- Year-end financials
- Audit reports
- Congregation assets

Keep Indefinitely

- Articles of Incorporation
- Bylaws
- Expired insurance policies
- Historical records
- Membership and attendance records
- Guestbooks