

RETENTION OF RECORDS

These guidelines are general suggestions only. Your finance committee or auditors may have suggestions for your situation. (Your Grand Jurisdiction may have a set of rules for you to follow).

- Minute Books-kept forever
 - Officers, Members and Visitors book-keep one past book and the current one
 - Secretary cash book-destroy after 7 years
 - Treasurer cash book-destroy after 7 years
 - Canceled checks and Bank statements-destroy after 7 years
 - Roll Book with bylaws -kept forever
 - Petitions
 - Degrees-destroy-records of deceased members
 - Demitted-keep for several years in the event they return to the chapter
 - Suspended-keep for several years in the event they return to the chapter
 - Ledger:
 - If bound - keep forever
 - If loose-leaf - delete record of deceased members
 - Demitted-keep for several years in the event they return to the chapter
 - Suspended-keep for several years in the event they return to the chapter
 - Dues Receipt stubs-destroy at the end of the fiscal year (the record is recorded in the Secretary's cash book and in the ledger)
 - Correspondence:
 - Invitations-destroy after the date of the event
 - Newsy letters-destroy after they have been read in chapter
 - Bills to be paid-destroy after they have been paid-this is recorded in the Secretary's cash book
 - Requests for demits-destroy after the action has been taken-this is recorded in the minutes or at the end of the fiscal year
 - Miscellaneous-destroy after action (if any) and recorded in the minutes
 - Rituals-may be kept or destroyed if needing updating
 - Proceedings-kept for historical and reference purposes
 - Secretary receipts to treasurer-destroy at the end of the fiscal year or when bill is paid
 - Treasurer receipts to secretary-destroy at the end of the fiscal year
 - Reports:
 - * Sickness, distress etc.-destroy at the end of the meeting reported. (This is recorded in the minutes)
 - * Monthly and Year end-destroy at the end of the meeting reported (this is recorded in the minutes)
- Dispensations:
- * Grand Jurisdictions of subordinate chapters-destroy yearly
 - * Subordinate chapter under the General Grand Chapter-destroy after each Triennial
- Annual Reports - keep forever

Prepared by RWGS prior to January 1, 2008