

A **Client Book** is created annually and kept indefinitely. The Client Book contains the following records:

- Board of Directors meeting agendas, minutes and attachments
- Year End Financial Reports
- General Correspondence to all members
- Product Show information
- Program and Social Event Notices

#### **Programs**

- Notices/Promotional Materials (electronic or hard copy)
  - Final Version Indefinitely
  - Draft Until Program is complete
- Meeting Registrations At the end of the Current Programming Year
- Meeting Handouts
  - Hard Copy (if applicable) 1 year
  - Electronic 5 years
- Evaluations/Survey Results
  - Hard Copy (if applicable) current programming year
  - Electronic (individuals) current programming year
  - Electronic (summary of results) Indefinitely

#### **Membership**

- Member Surveys (electronic or hard copy)
  - Individual responses 1 year
  - Summary of results Indefinitely
- Chapter Newsletter
  - compiled version (electronic) Indefinitely

#### **Accounts Payable**

- Original Invoices (electronic or hard copy) 7 years

#### **Accounts Receivable**

- Invoice Register (electronic) 7 years
- Deposit Records (electronic or hard copy) 7 years
- Tax Records/IRS Correspondence (hard copy) 7 years

#### **General Finance**

Financial Reports/Bank Statements/Budgets Indefinitely

#### **Photographs**

- Electronic Indefinitely

#### **Board**

- Strategic Plan Indefinitely

- Minutes/Agendas  
hard copy current Board year  
electronic indefinitely

#### **General Industry Information**

- (electronic or hard copy) 1 year unless still applicable

#### **Legal Correspondence**

- (electronic or hard copy) 2 years or until no further action is required

#### **Corporate Papers**

- Articles of Incorporation Indefinitely
- Charter Indefinitely
- Constitution & Bylaws Indefinitely

#### **Insurance**

- Policies 8 years