

University Baptist Church
Policies, Procedures and Guidelines Manual

Records Retention Schedule

Consistent with standard business practices, UBC hard copy records will be retained as follows:

BY DOCUMENT:

- | | |
|--|-----------------------------------|
| • Contribution records | 7 years plus current year |
| • Returned mailings | 1 year |
| • Bank and brokerage statements, cancelled checks, deposit slips | 7 years plus current year |
| • End of Year reports (December) | Permanent |
| • Payroll reports and supporting documentation | Permanent |
| • Employee files | Permanent |
| • Tax returns | Permanent |
| • Contracts, agreements, and related documents | 5 years from end of contract term |
| • Documentation of claims for property damage or personal injury | 5 years* |

(In case of injury to minor child: 5 years or until 1 year after child reaches their majority, whichever occurs later.)*

BY TERM OF RETENTION:

1 Year

- Returned mailings

5 Years

- Contracts, agreements, and related documents – from end of contract term
- Documentation of claims for property damage or personal injury*

(In case of injury to minor child: 5 years or until 1 year after child reaches their majority, whichever occurs later.)*

7 Years + current year

- Contribution records
- Bank and brokerage statements, cancelled checks, deposit slips
- Contracts, agreements, and related documents
- Vendor invoices

Permanent

- Payroll reports and supporting documents
- Employee files
- Tax returns