

## SOLAR Proposed Record Retention Policy

Permanent documents would include –

Articles of Incorporation – original and amendments

Bylaws – all versions

IRS application for non-profit status and IRS approval of same

Annual Michigan Filings

Annual Federal Filings

Board minutes

Important correspondence – legal and important matters (ie – Pixsie)

Periodic documents –

Recommendations for non profit records are 3 years for bank statements and reconciliation and 7 years for invoices and expense schedules, as well as contracts and leases.

Since we are small, and we don't have a large amount of records for a given year, I recommend that we keep everything for 7 years.

I have scanned everything we have from 2013-2019 (7 years.) I have these on my computer at home and have a backup copy on our company server.

Questions for Steering Committee (and Webmaster) –

I am going to scan as many of the permanent documents listed above and organize in a permanent folder on my computer with subfolders for the categories listed. Stacie, is there a way to upload a copy of this to our website but not available for public viewing? Like maybe something the President and Treasurer have access to if needed?