

RECORDS RETENTION

Digital and paper records are acceptable.

Permanent

- Minutes
- Bylaws and Standing Rules
- PTA Charter
- Confidentiality, Ethics, and Conflict of Interest Policy
- Tax and Legal Correspondence
- Insurance Policies and Claims

7 Years

- Contracts and leases
- Budgets adopted at meetings
- Financial Report
- Grant Agreements

3 Years

- Bank statements
- Deposit Forms
- Expense Forms
- General correspondence