

**LOCAL CHURCH RECORDS  
WHAT TO SAVE, HOW LONG, & WHAT TO ARCHIVE**

THE RECORDS, SERIES, TITLES	DESCRIPTIONS	TOTAL YRS	CURRENT	ARCHIVES
Accident & Injuries Records	Workers Compensation Claims Records	Settled +6	Active	No
Accounts Payable Records	Claims & Disbursements Records, Expenses, Accounting, Bookkeeping, Paid Invoices, Finance, Purchasing	5	2	No
Accounts Receivable Records	Membership contributions, Offering Records	5	2	No
Administrative Reports	Charge Conference reports, Administrative Board reports, Council on Ministries report, or administrative council reports	Permanent	2	Yes
Annual Fiscal Reports	Closing of the Books Records, Financial Reports, Balance Reconciliation Records, State Accounts Report	10	2	No
Architectural Drawings, Blueprints, & Maps		Permanent		Yes
Audit Records		20	2	No
Bank statements		5	2	No
Benefits Policies & Procedures Records		Active +2	Active	No
Budget Records	Annual Budget	Permanent	2	Yes
Bulletins	Sunday worship bulletins, special local church occasion bulletins	Permanent	2	Yes
Committee Reports	Local church committee records	Permanent	2	Yes
Correspondence- subject	Correspondence on special topic interest	Permanent	Active	Yes
Correspondence - transitory	Routine correspondence	1	1	No
Deduction Authorization Records	Deduction Input List	Active +4	Active	No
Directories		Permanent	Current	Yes
Employment Eligibility Verification Forms		Active +1 (3 yr.min.)	Active	No
Employment Policies & Procedures Records	Employment Policies	Permanent	Active	Yes
Grievance Records		Active +3	Active	No
Membership record	Membership register, baptisms, marriages, transfers	Permanent		Yes
Newsletters	Church newsletters, UMW, UMM, UMYF and other church groups newsletters	Permanent	2	Yes
Pay Authorization Records		5	2	No
Personnel Records	Personnel Files	75	Active	Yes
Tax Withholding Authorization Records		Active +5	Active	No