

**TREDYFFRIN EASTTOWN CARE
DOCUMENT RETENTION POLICY**

Tredyffrin & Easttown Care, a Pennsylvania nonprofit corporation (the “Organization”), takes seriously its obligations to preserve the Organization’s records relating to any litigation, audits and investigations. The information listed in the retention schedule below is intended as a guideline and the Board will use reasonable efforts in an attempt to follow such guideline.

File Category	Item	Minimum Retention Period
Corporate Records	Bylaws and Articles of Incorporation	Permanent
	Corporate resolutions	Permanent
	Board and committee meeting agendas	Permanent
	Board and committee meeting minutes	3 years
Finance and Administration	Financial statements (audited)	Permanent
	Auditor management letters	7 years
	Check register and checks	7 years
	Bank deposits and statements	7 years
Insurance Records	Policies	Permanent
Tax	IRS exemption determination and related correspondence	Permanent
	IRS Forms	Permanent
	Charitable Organizations Registration Statements	7 years
Technology	Software licenses and support agreements	3 years after all obligations end

1. Electronic Documents and Records.

Electronic documents will be retained as if they were paper documents. The Board will use efforts to maintain for the appropriate amount of time any electronic files that fall into one of the document types on the above schedule

2. Document Destruction.

The Board will make an effort to identify its records, which have met the required retention period, and oversee their destruction. The Board will use efforts to destroy financial and personnel-related documents by shredding.