

Mount Toby Record Retention and Destruction Schedules (12/11/2025 version)

Item	Duration (Permanent and recommended for submission to Archives) (How long the archives should keep these)	Hold For (How long we need to keep copies at Mount Toby)	Examples and notes	Should go to SCUA yes/no? and restrictions?
<i>Finance related :</i>				All no except as they are attached to MfB minutes
Audit reports and audit letters	Permanent	7 years		
Checks, receipts, (important payments and purchases)	7 years or the life of the specific piece of equipment	7 years or for life of specific piece of equipment	Anything related to the building and grounds, such as boiler, alarms, wiring etc.	
Contracts, rental agreements	7 years after expiration?	Scan and attach to Mfb minutes; keep originals with clerk records for 7 years after expiration		
General Ledger and accounts payable	Permanent	7 years	Accounts Payable, donation records and other income such as grants or rentals	
Employment, retirement, and pension records	Permanent	7 years		
Year-end financial statements	Permanent	7 years		

Property Related:

Cemetery Burial Records	Permanent	Permanently	Records of what plots are leased or sold and records of those buried with or without stones	Yes – copies
Deeds and Titles	Permanent	Permanently		No
Maintenance records and building specifications for original building, repairs, and additions	Permanent	7 years following the end of the facility or proper discharge of the property (roof and well, etc., do not end)		No
Mortgages and bills of sale	Permanent	Until completion of mortgage or terms of sale, then 7 years		Yes – copies

Clerk, Recorder, Treasurer - Business Meeting related:

Clerk's Correspondence	Permanent	Attach to MfB minutes for permanent retention	Correspondence to public officials, other meetings, letters of transfer	Yes
Correspondence (e.g. legal, with public officials on behalf of the Meeting, relating to property, or membership, or on discontinuances or on other matters of enduring impact)	Permanent	Keep membership info (on paper) on-site until the death or transfer of the member or until the memorial minute is written. Electronic records (email, etc.) should be attached to MfB minutes.	Correspondence with public officials and other Meetings, letters to public officials from the Monthly or Quarterly Meeting or Committees; Letters of Transfer, requests for membership, births/deaths/marriages; routine correspondence such as planning or with vendors	Yes
Bylaws and charter, handbooks, or procedure documentation.	Permanent	10-15 years for local reference or until superseded		Yes
Monthly Meeting Minutes and reports to Monthly Meetings, Memorial Minutes and State of Society reports, committee minutes. All in electronic format.	Permanent	Archive the final originals every 2 years at the end of the meeting clerk's term. Keep a local copy at least 15 years for local reference.		Yes for MfB, MM, SoS, no embargo. Embargo of committee minutes to be established later since they have different levels of confidentiality

Vital records, records of the Meeting Recorder, conscientious objector statements	Permanent	7 years after death	Membership lists, records of weddings, births, deaths	To archives 7 years after death or loss of contact
<i>Meeting Life:</i>				
Meeting histories, member oral histories and spiritual journeys with signed release forms, past committee rosters, directories, meeting newsletters	Permanent	Items in electronic format will be available permanently. Items on paper will be archived 7 years after death.	Consider embargoes for items with personal information (newsletters, directories).	Yes. Directories and meeting newsletters embargoed for 20 years. Spiritual Journeys with releases treated as records of the Meeting Recorder. Spiritual journeys with no release don't get archived.
Pamphlets or books published by the Meeting	Permanent (one copy)	For the useful life of the item plus 7 years.	Booklets on membership or death and dying created by Meeting for the Meeting	Yes
Photos, slides, presentations of Meeting events, with identifying captions	Permanent (one copy)	Permanent in electronic format,	Photos should be captioned. Release forms for photos of children. Release forms from authors of presentations should be obtained wherever possible.	Yes
Travel Minutes with Endorsements when returned to us	Permanent	Scan and attach to MfB minutes, original to Recorder	Treat as a record of the Meeting Recorder	Yes

Records to Keep then destroy

Type of Record	Number of years to keep	Comments
Bank reconciliations	3	shred
Bank Statements	7	shred
Correspondence (general- logistics of scheduling, etc. This would not be correspondence specific to Monthly Meeting business, but may relate to presentations, retreats, etc.)	3	Or dispose of when no longer needed
Correspondence with vendors	3	
Depreciation schedules	7	
Duplicate deposit slips	3	Shred
Non-historic expired checks, receipts, mortgage notes or leases	7	After expiration
Employment applications	3	Do not put in recycling without shredding.
Expense analyses/distribution schedules	7	
Insurance policies	7	
Insurance records, accident reports, claims	7	If a meeting is aware of pending or anticipated government proceedings or private litigation, relevant documents may need to be held longer than specified in this table.
Internal audit reports	3	

Inventory records	3	AV equipment holdings (inactive), etc.
Invoices	7	
Payroll records and summaries	7	Do not put in recycling without shredding.
Personnel files (terminated employees)	7	Do not put in recycling without shredding.
Tax returns and worksheets	7	Shred
Timesheets	7	Do not put in recycling without shredding.
Withholding tax statements	7	Shred