

POLICY:**RECORD RETENTION SCHEDULE****GENESEE FOUNDATION RECORDS**

Accounts Payable Support Ledger	7 Years	Foundation Office/Storage	Community Relations Manager
Accounts Receivable Activity for Member Accounts/delinquencies	2 years	Foundation Office/Storage	Community Relations Manager
Accounts Receivable Support Ledger	7 years	Foundation Office/Storage	Community Relations Manager
Annual Meeting information	Permanently	Foundation Office/Storage	Community Relations Manager
ARC Files	Permanently	Foundation Office/Storage	Community Relations Manager
Assessment Information	7 years	Accountants Office, Foundation Office/Storage	Community Relations manager
Audits/ Tax returns	Permanently	Office safe	Community Manager
Election Ballots	4 years	Foundation Office/Storage	Community Manager
Bank Statements/Cancelled check	7 years	Foundation Office/Storage	Community Relations Manager
Board Minutes	Permanently	Foundation Office/Storage	Community Manager
Board Packets	1 year	Foundation Office/Storage	Community Manager
Budgets/Support files	7 years	Foundation Office/Storage	Community Manager
Committee Files	1 year	Foundation Office/Storage	Community Relations Manager
Committee Minutes	Permanently	Foundation Office/Storage	Community Relations Manager
Contracts	4 Years	Foundation Office/Storage	Community Relations Manager
Correspondence	4 years	Foundation Office/Storage	Community Relations Manager
Covenant/ARC Violations	Permanently	Foundation Office/Storage	Community Relations Manager
Employee Applications (not hired)	2 years	Foundation Office/Storage	Community Relations Manager
Easements/Encroachments/Deeds	Permanently	Foundation Office/ /Safe	Community Manager
Financial records (Other)	7 Years	Foundation Office/Storage	Community Relations Manager
Financial Statements	Permanently	Foundation Office/Storage	Community Manager
General Ledger	Permanently	Foundation Office/Storage	Community Manager
Insurance Claims (settled)	4 years	Foundation Office/Storage	Community Manager
Insurance Policies (expired)	7 years	Foundation Office/Storage	Community Manager
Litigation Files	Permanently	Foundation Office/Storage	Community Relations Manager
Newsletters/flyers	Permanently	Foundation Office	Community Relations Manager
Payroll records	7 years	Foundation Office/Storage	Community Relations Manager
Personnel records	Permanently	Foundation Office/Storage	Community Relations Manager
Plat maps and Development Guides	Permanently	Foundation Office/Storage	Community Manager
Policies	Permanently	Foundation Office	Community Manager

Proposals and Bid Specifications	4 years	Foundation Office/Storage	Community Relations Manager
Reserve Studies	Permanently	Foundation Office/Storage	Community Manager
Resumes (not hired)	1 year	Foundation Office/Storage	Community Relations Manager
Time Sheets	2 years	Foundation Office/Storage	Community Relations Manager

APPROVED BY: Board of Directors

SUPERCEDES: None

APPLICABILITY: All records

APPROVAL DATE: August 10, 2005

REVIEWED DATE: January 13, 2010

EFFECTIVE DATE: August 10, 2005

REVIEW DATE: 2015 (5 years)