

# DOCUMENT RETENTION AND DESTRUCTION POLICY

Purpose: To create and maintain a systematic method for ensuring that Naples Garden Club records are protected and maintained and that they are discarded when no longer needed or valued.

Policy: This policy covers all records and documents, regardless of physical form, indicates how long certain documents should be kept, who is responsible for the maintenance of the documents, and requires that documents are to be destroyed at the end of the retention period. The policy ensures compliance with Florida state law.

Naples Garden Club shall maintain hard copies of the documents in its office. Electronic copies of those documents are posted to its website unless otherwise noted.

The Treasurer is responsible for the maintenance of the financial records; the Secretary is responsible for the maintenance of all other documents.

**DOCUMENT RETENTION AND DESTRUCTION POLICY SCHEDULE**

DOCUMENT TYPE	RETENTION PERIOD	
	HARD COPY	ELECTRONIC COPY
Articles of Incorporation	Permanent	Permanent
Bylaws	Latest Copy	Latest Copy
Standing Rules	Latest Copy	Latest Copy
Strategic Plan	Latest Copy	Latest Copy
Policies	Latest Copies	Latest Copies
IRS Determination Letter and application for Exemption	Permanent	Permanent
Annual Registration Notice of Tax Exemption State of Florida	Latest Copy	Latest Copy
Tax Returns - Form 990	7 Years	7 Years
Financial Reports	3 Years	3 Years
Bank Statements	3 Years	None
Grants Made	10 Years	3 Years
Contracts and Letters of Agreement	3 Years	3 Years
Trademarks	Renewed every 5 Years	Renewed every 5 Years
Insurance Policies	3 Years	Latest Copy
President's Annual Report	3 Years	3 Years
Annual Reports of Programs/Education, House & Garden Tour, Flower Show	3 Years	None
Flower Show Handbook	Latest Copy	Latest Copy
Board and Members Meeting Minutes	3 Years	3 Years
Board Packets	Latest Copy	Latest Copy
Committee Meeting Minutes	3 Years	3 Years
Committee Members Lists	3 Years	None
Member Directories	3 Years	Latest Copy
Brochures, Schedules	3 Years	None
Donations Records	10 Years	3 Years
News Letters to Members	3 Years	Latest Year Copies
Press Releases, Press Clippings	3 Years	None
Logos	Latest Copies	Latest Copies