

Congregation Records Retention Schedule

Minutes	permanent
Registers	
Annual reports	
Reports	
Bylaws/charters	
Incorporation records	
Annual budgets	
Annual audits	
Annual financial statements	
Subject correspondence	
Manuals/handbooks	
Newspapers/newsletters	
Brochures/promotional materials (1 copy)	
Photographs	
Scrapbooks	
Architectural drawings, plats, plans, blueprints	
Wills, bequests	
Legal/judicial cases	
Loan agreements	satisfaction + 20 years
Property appraisals, records of sale	20 years after sale
Contracts	active + 3 years
Personnel records/employee records	employment + 7 years
FICA / W-2 records	7 years
Accounts payable invoices	3 years
Accounts payable	7 years
Accounts receivable records	3 years
Bank deposit slips	3 years
Bank statements	7 years
Canceled checks	7 years
Cash receipt records	3 years
Data for updating mailing lists	1 year
Mailing lists	active
Periodic financial statements	2 years
Expense reports	7 years
General/routine correspondence	3 years
Invitations	1 year
Petty cash records	7 years
Receipts of purchases	7 years
Meeting notices	1 year
Travel plans/arrangements	1 year
Resource files	active



Questions? Contact us:

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