

Illinois Society of Oral and Maxillofacial Surgeons

Approved 2/28/2009	Record Retention Policy	
Membership Files	Minimum Retention Schedule	Destruction Method
Former Members	10 years	shred
Deceased Members	10 years	shred
Financial Information		
Receipts for Purchases	7 years	trash
Bank Statements	7 years	shred
Financial Reports	7 years	shred
Financial Audits/Compilation Reports by Accountant	indefinite	(shred)
Tax Correspondence (State and Federal)	7 years	shred
Proof of Tax Status	indefinite	(shred)
Incorporation (State)	indefinite	(shred)
Personnel Records		
N/A		
Documents		
ISOMS Newsletters	1 sample in binder; chronological	trash
Membership Directories	1 sample -- 10 years	trash
Executive Committee Lists	indefinite	shred
Executive Committee Minutes	10 years	shred

Annual Meeting Minutes	10 years	shred
General Membership Meeting Minutes	10 years	shred
Membership Meeting Announcements	10 years - 1 sample of each in binder	trash
Continuing Education Programs	In folders, by month and year	
Program Announcements	7 years	trash
Registration Lists	7 years	trash
Sign-In, Sign-Out Sheets	7 years	trash
Speaker Information & CVs	7 years	trash
Speaker Correspondence	7 years	trash
Insurance Policies		
Director's & Officer's Liability	7 years	shred
Non-owned auto insurance	7 years	shred
Association Events	7 years	shred
General Business Liability	7 years	shred
Business Contracts		
Management Services	as long as contract is current, then 7 years	shred
Other services (web site, etc.)	as long as contract is current, then 7 years	trash