



*The First Church of Christ in Mansfield  
(Congregational), UCC  
549 Storrs Road, P.O. Box 36  
Mansfield Center, CT 06250-0036  
(860) 423-9008*

## **Document Retention Policy Revised and adopted 4/3/2018**

1. Disbursement records – 3 years after external audit. These records include bills, invoices, and reimbursements.
2. Invoices relating to appliances and computers – until the appliance or computer is discarded.
3. Treasurer and collector's reports and month deposit slips – until external audit.
4. Bank statements and investment statements – 3 years after external audit.
5. Annual Report – Life of the Church.
6. Pledging information – until external audit.
7. Donation information – 7 years or until external audit, whichever is later.
8. Search information (Pastor)
  - a. Final report – permanent
  - b. Support documentation – discard all but most recent search for current position
9. Personnel files – duration of employment plus 30 years
10. Payroll files (time sheets) – until external audit
11. External and internal audit reports – Life of the Church
12. Annual Financial Report – Life of the Church
13. Governing Board (and former Executive Council) reports and minutes – 5 years
14. Tax withholding records and payment forms – 3 years after external audit.

Note: Only the original (or a copy if the original does not exist) of records must be kept, in accordance with this plan.