



LEO A. DEEGAN
AMERICAN INN OF COURT

RECORD RETENTION POLICY

The Leo A. Deegan Inn of Court, by and through its Board, adopts this record retention policy.

The following records shall be kept for at least ten (10) years:

- End of year financial statements
- Dues payments records
- Donor records
- Membership records (list of members and applications for membership)
- Copies of receipts evidencing/justifying expenditures and reimbursements

The following records shall be kept permanently:

- Audit reports
- IRS filings
- Foundational documents, including but not limited to:
 - The charter
 - The bylaws
 - The Inn's policies
- The Board meeting minutes
- Program year team, date, and topic list

The Leo A. Deegan Inn of Court deems that digital copies of all documents are acceptable. However, if the Inn has contracts or other items with original signatures, it may decide to retain the paper copies.

In its discretion, the Board may also determine that additional documents shall be kept for the purpose of historical reference.

As the national office of the American Inns of Court maintains electronic historical records for each Inn on its computer servers, the Board may also decide to send new documents (that are outside of general reporting for the national Inn electronic records) to the national office for preservation.

Adopted by the Leo A. Deegan Inn of Court Board on April 9, 2020.