

Lodge Record Retention Guidelines

To be Kept in Perpetuity

Lodge Charter

Lodge Bylaws

Lodge or District Building Association's financial and original records (*such as articles of incorporation and charter*) if applicable

Lodge Seal Embosser (*if the lodge has one*)

Lodge Scrapbooks

Secretary's Minute Book *

Membership Roster *

Membership Record Book(s) (*3-ring binder(s) with complete, current individual membership record sheets for current members*) *

Seven Years

D17 Annual Financial Statement

Treasurer's Cash Book*

Financial Secretary's Cash Book*

Cancelled checks, bank account statements

Data filed with state/provincial taxation agencies

990 Tax Forms

Two Years

Treasurer's Record of Bills*

Membership Records of individuals who left the organization (suspended or cancelled) two or more years ago.*

One Year

Treasurer's copy of the Financial Secretary's Report to Treasurer*

Financial Secretary's copy of above report*

Lodge copy of Membership Applications *

**In many lodges, the forms marked with an asterisk are no longer being utilized. That information may be kept in a different format, such as on a computer spreadsheet. Don't be concerned if your lodge doesn't have some of these specific forms in its collection.*