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## RECORDS MANAGEMENT POLICY

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Wilderwood Equine Therapy and Rescue adheres to the following Records Management Policy in relation to the storage, destruction, and preservation of the files, documents, and records associated with the non-profit organization.

Document	Electronic	Hard Copy	Length of Storage
Accounts	External disc drive	File folder	10 years
Articles of Incorporation	External disc drive	File folder	Permanently
Audit Reports	External disc drive	File folder	10 years
Bank Statements		File folder	10 years
By-Laws	External disc drive	File folder	Permanently
Cash Receipts/Books		File folder	10 years
Canceled checks		File folder	10 years
Contracts and leases		File folder	Permanently
Correspondence: General	Email	File folder	4 years
Correspondence: Legal	Email	File folder	Permanently
Donation records	External disc drive	Annual Report	Permanently
Employee/Volunteer Records <sup>1</sup>	External disc drive	File folder	7 years
Employment Applications	External disc drive	File folder	3 years
Financial Statements	External disc drive	Annual Report	Permanently
Insurance policies	External disc drive	File folder	Permanently
Insurance records	External disc drive	File folder	Permanently
Internal reports	External disc drive	File folder	3 years
Inventory and assets	External disc drive	File folder	10 years
Invoices	External disc drive	File folder	10 years
Minutes and Agendas	External disc drive	File folder	Permanently
Payroll	External disc drive	File folder	10 years
Taxation documents	External disc drive	File folder	Permanently

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<sup>1</sup> After termination of employment or volunteering agreement.

### **Exception to Policy**

All permitted document destruction shall be halted if the organization is being investigated by a governmental law enforcement agency, and routine destruction shall not be resumed without the written approval of legal counsel or the Executive Director.

This Records Management Policy was approved by the Board of Directors of Wilderwood Equine Therapy and Rescue on May 7, 2021.