

<h1>Hosanna Lutheran Church</h1>		
<b>Records Retention</b>		
ADMINISTRATIVE	Origin Date:	June 14, 2013
POLICY	Revision Date:	July 28, 2013

The following is the record retention policy for Hosanna Lutheran Church.

## **PARISH REGISTER**

The Parish Register includes the following:

- Baptisms
- Confirmations
- Marriages
- Funerals
- Communion participation / attendance
- Pastors of the congregation
- Other professional lay workers
- Roster of Officers of the Congregation

The Pastor is responsible for maintenance of the Parish Register. The Parish Register is a permanent record and is required to be kept in an up-to-date and orderly fashion, and in a safe place- preferably a fire proof safe- or maintain copies in an offsite location.

## **LEGAL AND VITAL RECORDS**

Legal and vital records include the following documentation:

- Charter or articles of incorporation
- Constitution, bylaws, and resolutions
- Copies of letters of call to pastors
- Deeds, titles, surveys, leases, mortgages, easements and construction drawings
- Documentation creating endowment funds, bequests, special gifts
- Employment contracts
- Insurance policies (current and retired)
- All congregation meeting minutes, regular and special, including all handouts and documents approved at the congregational meeting
- All congregational council meeting minutes
- Personnel handbooks and employee benefit programs
- Policy documentation
- Service or construction contracts
- State of Texas information regarding non-profit copies
- Tax exempt status reports and the church's FEIN

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Legal and vital records become part of the permanent records of the church and should be kept current, in an orderly fashion in a fire proof safe or maintain copies in an offsite location.

## **FINANCIAL RECORDS**

Hosanna has a management database that handles all the accounting transactions. This needs to be placed in the congregation's archives. The programs must be accompanied by the software version that was used to create those documents.

- Hardcopy documents
- Investments in assets management
- Bank statements
- Cancelled checks – currently included in bank statements
- Bank reconciliations
- Payroll administration records
- Cash receipts detail
- Record of member giving
- General invoices
- Offering envelopes

The IRS mandates that we keep the documents for four years. It is Hosanna's guidelines to keep them for five years.

## **CONGREGATION STATISTICS**

Congregation statistics reports that go to the Synod are retained in hard copy for a period of two years.

## **INFORMATION ON PERSONS**

Files may be kept on pastors or other employees containing information such as letters of call, letters of employment, letters of applications, resumes, correspondence, letters of recommendation, background and reference checks, annual and other performance evaluations, employment contracts including documentation related to compensation and benefits.

These documents should be kept 50 years after completion of service.