

PTO/PTA/Booster Club Record Retention

How long should you keep paperwork? Here are some guidelines.

3 Years:

Monthly treasurer reports

7 Years:

Bank statements

Canceled checks

Check registers

IRS Form 990, 990-EZ, 990-N

Permanently:

Incorporation paperwork

IRS Form 1023 and documentation

IRS determination letter for 501(c)(3) tax-exempt status

Meeting minutes and agendas

Year-end treasurer reports

Annual reports from auditor (financial review)