

Retention Record

INSTRUCTIONS TO OFFICERS OF LOCAL CHAPTERS (IOLC) RECORDING SECRETARY

Instructions may be downloaded from the official P.E.O. website:
 Address: peointernational.org Username: [sisterhood](#) Password: [seven](#)

Retention Record

TYPE OF RECORD	RETENTION
Retain or destroy material in accordance with this record.	
Instructions for Minutes, Recording Secretary's Record Book	Current
Corresponding Secretary's Monthly Report to Chapter form	Destroy after report is recorded in minutes and minutes are approved
Social correspondence	Destroy after correspondence is recorded in minutes and minutes are approved
Treasurer's Monthly Report to Chapter form	Keep until end of fiscal year and give to Auditing Committee Destroy after audit report is recorded in minutes and minutes are approved
Worksheets or temporary minutes	May be destroyed after minutes are approved by the chapter
Minutes	Life of chapter Minutes of chapter must be kept in their original form for a minimum of 25 years Upon vote of chapter, minutes older than 25 years may be preserved in any manner in accordance with archival policy (Refer to Policies section – Archival Storage for Minutes and/or Historic Memorabilia)

If it is not on this list, feel free to PURGE. As P.E.O.s, we often keep far more than necessary. Do yourself and your successors a favor, clean those files.