



Appleton Area Hockey Association (AAHA)

Policy

Record Retention Policy

Approved by: AAHA Board of Directors on 2/11/25

Posted: 4/1/2025

Due for next review on or before: 2/11/2028

Purpose – Record and retention guidelines for the Appleton Area Hockey Association. All record retention will begin starting with the year 2017.

The following holding periods shall be used for the maintenance of the documents listed below:

Accounting

Accounts Payable	5 years
Accounts Receivable	5 years
Audit Reports	5 years
Chart of Accounts	5 years
Depreciation Schedules	5 years
Expense Reports	5 years
Fixed Asset Purchases	5 years
Financial Statements (Annual)	5 years
Tax Returns and Working Papers	5 years
Purchase Requisitions	5 years
Purchase Orders & Correspondence	5 years
Refund Requests	5 years
Scholarship Requests	5 years
Fundraising - Raffle Tickets	1 year

Bank Records

Bank Reconciliations	5 years
Bank Statements	5 years
Cancelled Checks	5 years
Checks for Capital Purchases & Important Contracts	5 years
Electronic Payment Records	5 years
Petty Cash Vouchers	5 years

Organizational Records

Meeting Minutes – Board of Directors	Permanent
Bylaws, Articles of Incorporation	Permanent
Business Licenses	Life + 4 years
Contracts > \$5000	Life + 4 years
Legal and Tax Correspondence	5 years
Contracts < \$5000	Life + 4 years
Insurance Policies, Accident Claims	Life + 4 years



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Operational Records

Concussion Reports	5 years
Medical Clearance and Return to Play Forms	5 years
Injury Reports and Return to Play Forms	5 years
Policies and revisions	5 years
Coach Concussion Agreements	5 years
Background Screening Results	5 years
Conduct Committee Reports	5 years
Conduct Committee Documentation	5 years