THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS

Use and Retention of Records and Reports—2006

(Wards and Branches in the United States)

The following are current record-keeping materials for wards and branches. Keep materials according to retention instructions. For example, "keep for three years" means keep for three more years each document created during the year. Completely destroy printed records and reports after the retention period so the information cannot be reconstructed. *Specific distribution information is in italics.* Destroy all previous lists of record-keeping materials. Destroy outdated, unused forms; check the date at the bottom of the form, and keep only the forms with the latest date.

Title and number	Latest date	Use and retention
Financial		
Annual Charitable Cash Contributions Official Tax Summary Statement (MLS)	NA	A donor's record of contributions. *Give to the donor.* Keep for one year those that cannot be distributed.
Church Unit Checking Account checks and check stubs	NA	Use checks to pay ward or branch expenses. Attach stubs to expense records. Keep stubs for three years.
Church Unit Financial Statement	NA	A record of checking account transactions. Use to reconcile with MLS monthly. *Sent each month by Church headquarters.* Keep for three years.
Fast-Offering Envelope (31591)	11/92	Use to gather fast offerings from members. Keep until worn out or until an updated version arrives.
Internal Record of Purchase/Service (35189)	10/93	Use to verify items charged to the ward or branch by Church departments or Distribution Services. *Sent from Church headquarters.* Keep copy for three years.
Member and Leader Services (MLS) printouts	NA	Use according to guidelines in the MLS Help and current financial policies.
Order Form (33360)	9/03	Use to order items from Distribution Services. Keep copy for three years.
Outstanding Checks—Annual Report (34579)	12/04	Use to report outstanding checks more than six months old. *Send to the stake or district.* Keep copy for three years.
Signature Card (31623)	10/98	Use to record signatures for the ward's or branch's Church Unit Checking Account. *Send to Church headquarters.* Keep a photocopy to identify current signers. Keep until updated with new signers.
Tithing and Other Offerings form (31592); envelope (31589)	5/01; 5/92	Members use when making contributions to the Church. Keep forms with donation reports for three years. Destroy envelopes after opening.
Tithing Declaration Report for All Members (MLS)	NA	A report of members' tithing status. *Send to Church headquarters and the stake or district president.* Keep for three years.
Travel and Long-Distance Telephone Reimbursement Request (31563)	8/98	Use to request reimbursement for Church travel and telephone expenses from the stake or district. Keep with expense records for three years.
Ward or Branch Financial Audit (34244)	12/04	The stake or district completes the audit and gives a copy of the report to the ward or branch. Keep for three years.
Historical		
Instructions for Preparing the Annual History (36388)	3/01	Use to prepare the ward or branch annual history. *Send to the stake or district by January 15 every year.* Keep a copy until no longer needed.
Officers Sustained—Branch in Mission (32303) (also MLS)	6/05	Prepare to be read at branch conference. *Give to the district or mission president to include in the district or mission history.*
Officers Sustained—Ward or Branch in Stake (32302) (two separate forms in MLS)	6/05	Prepare to be read at ward or branch conference. *Give to the stake president to include in the stake history.*

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Membership		
Aaronic Priesthood Ordination Record and Certificate (35857) (also MLS)	12/04	Prepare for members ordained to the Aaronic Priesthood. Keep copy for one year.
Baptism and Confirmation Certificate (35920) (also MLS)	12/04	Prepare for members baptized and confirmed.
Baptism and Confirmation Record (35919) (also MLS)	6/05	Prepare for those recommended for baptism. Keep copy until the permanent membership record arrives.
Child Blessing Record and Certificate (35856) (also MLS)	12/04	Prepare for children blessed. Keep copy for one year.
Melchizedek Priesthood Ordination Record and Certificate (35858) (also MLS)	12/04	Prepare to recommend members for ordination to the Melchizedek Priesthood. *Send to the stake or district.* Keep copy for one year.
Membership Record (MLS)	NA	The ward or branch should have one in the Member and Leader Services (MLS) program for each member living in the ward or branch.
Recommend to Perform an Ordinance (32595)	8/01	Prepare for a worthy priesthood holder to perform an ordinance outside his home ward or branch. Keep copy for one year.
Request for Ordinance Information (32388)	12/91	Prepare to request information from the Family and Church History Department about ordinances that occurred before 1985. Keep copy until you receive a response.
Member Progress		
Attendance roll (MLS)	NA	Use to record attendance at meetings. Keep until quarterly Member Progress Report is submitted.
Member Progress Report—Ward and Branch (MLS)	NA	Use to report member progress information. *Transmit to Church headquarters and send a copy to the stake or district within 15 days after the end of the quarter.* Keep copy for one year.
Other		
Application to the First Presidency (35789)	9/03	Use to complete a member's application for actions that require First Presidency approval. Request from the Office of the First Presidency as needed. *Send to the stake or mission president. Do not keep a copy.*
Letters and notices with new instructions and policies from Church headquarters	NA	Keep until new editions of handbooks are issued or until notice is given to discard them.
Report of Administrative Action (32427)	2/05	Use to report a member's request to have his or her name removed from the records of the Church. Request from Distribution Services as needed. *Send to the stake or mission president.*
Report of Church Disciplinary Action (33493)	5/02	Use to report Church disciplinary proceedings and actions. Request from Distribution Services as needed. *Send to the stake or mission president.* File according to instructions on the form.

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