THE CHURCH OF
JESUS CHRIST
OF LATTER-DAY SAINTS

Use and Retention of Records and Reports—2006
(Stakes and Districts in the United States)

The following are current record-keeping materials for stakes and districts. 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 Destroy outdated, unused forms; check the date at the bottom of the form, and keep only the forms with the latest date.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		
Church Unit Checking Account checks and check stubs	NA	Use checks to pay stake or district 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.
Internal Record of Purchase/Service (35189)	10/93	Use to verify items charged to the stake or district by Church departments or Distribution Services. *Sent from Church headquarters.* Keep copy for three years.
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 Church headquarters with the Outstanding Checks—Stake Summary* form (35769). Keep copy for three years.
Outstanding Checks—Stake Summary (35769)	11/99	Prepare using information from the stake or district and ward or branch Outstanding Checks—Annual Report forms (34579). *Send to Church headquarters with the stake or district and ward or branch forms.* Keep copy for three years.
Signature Card (31623)	10/98	Use to record signatures for the stake's or district's Church Unit Checking Account. *Send to Church headquarters.* Keep a photocopy to identify current signers. Keep until updated with new signers.
Stake and District Financial Summary	NA	Use to monitor stake or district and ward or branch Church Unit Checking Account activity. *Sent each month from Church headquarters.* Keep for three years.
Stake or District Financial Audit (34246); Ward or Branch Financial Audit (34244)	12/04; 12/04	*Send the originals to the Church Auditing Department at Church headquarters.* Keep copies of the stake or district and ward or branch reports for three years.
Tithing and Other Offerings form (31592)	5/01	Use to account for funds received by the stake or district. Keep with deposit records for three years.
Tithing Declaration Report for All Members (MLS)	NA	A report of members' tithing status. *Sent from wards and branches in the stake or district.* 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 account. Keep with expense records for three years.
Historical		
Annual History for Stakes and Districts (32299)	3/01	Use to compile and submit the stake or district and ward or branch annual histories. *Send to the Church Archives.* Keep a copy until no longer needed.
Officers Sustained—District (32301) (also MLS)	6/05	Prepare to be read at district conference. *Give to the history specialist to include in the district historical summary.*
Officers Sustained—Stake (32300) (also MLS)	6/05	Prepare to be read at stake conference. *Give to the history specialist to include in the stake historical summary.*

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Membership		
Melchizedek Priesthood Ordination Record and Certificate (35858) (also MLS)	12/04	Prepare for members ordained to the Melchizedek Priesthood. Keep copy for one year.
Stake and District Audit of Membership Records (35584) (also MLS)	11/01	Use to audit the membership records of each ward or branch in the stake or district. Keep copy for one year.
Member Progress		
Member Progress Report—Stake and District (MLS)	NA	A compilation of member progress information from each ward or branch report. *Sent from Church headquarters each 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. In mission districts, this form is handled by the mission president. Request from the Office of the First Presidency as needed. *Send to the Office of the First Presidency.* Do not keep a copy of the form. After receiving notification that Church headquarters has received the application, destroy all copies of records related to the application.
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. In mission districts, this form is handled by the mission president. Request from Distribution Services as needed. *Send to the Office of the First Presidency.* After the ward or branch receives notice that the person's name has been removed from Church membership records, destroy any copies of this form.
Report of Church Disciplinary Action (33493)	5/02	Use to report Church disciplinary proceedings and actions. In mission districts, this form is handled by the mission president. Request from Distribution Services as needed. *Send to the Office of the First Presidency.* File according to instructions on the form.
Stake and District Organization Application (34203)	2/04	Use to apply for a stake or district reorganization. Request from the Office of the First Presidency as needed. *Send to Area Presidency.* Keep copy until organization is complete.
Ward and Branch Organization Application (34202)	2/04	Use to apply for a ward or branch reorganization. Request from the Office of the First Presidency as needed. *Send to Area Presidency.* Keep copy until organization is complete.

4/05. 35944