



THE GRAND LODGE OF ALBERTA

ANCIENT, FREE AND ACCEPTED MASONS

MASONIC FILE / RECORD RETENTION GUIDELINE

Records that you want to keep permanently should be protected both from time's impact and from other destructive factors. All such records should be kept in acid-free containers and off the floor. Some of the records that are originals are difficult, if not impossible to replace if they are lost or destroyed. Direct sunlight or fluctuations in temperature or humidity will shorten the lifespan of all types of records. If a flood or disaster occurs, do not throw everything away as there are specialists who can recover wet materials if you act quickly.

Digital materials are probably the most at risk. Digital documents are information created, received, downloaded or stored in electronic form on a computer or other electronic storage device. There are several hazards that threaten documents, including software or operating systems obsolescence and the short lifespan of storage devices such as hard drives, CD and DVD's. You should back-up your documents and transfer them periodically to a new storage device, every 3-4 years for CD's and DVD's, and every 4-5 years for both internal and external hard drives. You might also print the important files, as high-quality acid-free paper can last hundreds of years.

Remember that if you choose to give your records to a Provincial, Municipal, Library or Historical Society you will likely lose any future control over them and they will become public information. Choose wisely how you decide to archive your Masonic records and files. Archiving with Grand Lodge where recommended is safe and secure.

The following guidelines have been established to assist Lodges, Districts and Grand Lodge.

RETENTION ITEM	FORM No.	RETENTION PERIOD	ARCHIVE LOCATION	DISPOSITION UPON AMALGATION OR SURRENDER	DISPOSAL METHOD
LODGE DOCUMENTS					
Historical Register		Permanent	Grand Lodge	Grand Lodge	
Minute Books		Permanent	Grand Lodge	Grand Lodge	
Names, Charter Members		Permanent	Grand Lodge	Grand Lodge	
Lodge Charter		Permanent	Grand Lodge	Grand Lodge	
Past Masters Roll		Permanent	Grand Lodge	Grand Lodge	
List of Installed/Invested Members	162	Permanent	Grand Lodge	Grand Lodge	
Signatures to Lodge					
By-laws		Permanent	Grand Lodge	Grand Lodge	
Members Reister		Permanent	Grand Lodge	Grand Lodge	
Semi-annual returns	161	Permanent	Grand Lodge	Grand Lodge	
Lodge Degree Register		Permanent	Grand Lodge	Grand Lodge	
Annual Financial Statements	127	7 Years	At Lodge	Grand Lodge	Shred/Burn
Bank Statements		7 Years	At Lodge	Grand Lodge	Shred/Burn
Cancelled cheques		7 Years	At Lodge	Grand Lodge	Shred/Burn
Conduct Files		5 Years	At Lodge	Grand Lodge	Shred/Burn
Letters of Expulsion and Suspension		5 Years	At Lodge	Grand Lodge	Shred/Burn
Grand Lodge Proceedings		5 Years	At Lodge	Grand Lodge	Shred/Burn
Letter to Candidates	103	2 Years	At Lodge	Grand Lodge	Shred/Burn
Petition for Initiation	104/106	3 Years	At Lodge	Grand Lodge	Shred/Burn
Report of Committee for Initiation	105	3 Years	At Lodge	Grand Lodge	Shred/Burn
Petition for Affiliation	104/106	3 Years	At Lodge	Grand Lodge	Shred/Burn
Report of Committee for Affiliation		3 Years	At Lodge	Grand Lodge	Shred/Burn
Petition for Restoration	104/106	3 Years	At Lodge	Grand Lodge	Shred/Burn
Report of Committee for Restoration		3 Years	At Lodge	Grand Lodge	Shred/Burn
Statement of Work	160	2 Years	At Lodge	Grand Lodge	Shred/Burn
Letters to Grand Lodge		2 Years	At Lodge	Grand Lodge	Shred/Burn
Grand Lodge Especial Communications		2 Years	At Lodge	Grand Lodge	Shred/Burn
Lodge Summons		2 Years	At Lodge	Grand Lodge	Shred/Burn
Grand Lodge Bulletin (Alberta Freemason)		1 Year	At Lodge		Shred/Burn

RETENTION ITEM	FORM No.	RETENTION PERIOD	ARCHIVE LOCATION	DISPOSITION UPON AMALGATION OR SURRENDER	DISPOSAL METHOD
GRAND LODGE DOCUMENTS					
Grand Lodge Proceedings	5 Copies	Permanent	Grand Lodge	Excess Copies	Shred/Burn
Western Canada					
Conference Proceedings	5 Copies	Permanent	Grand Lodge	Excess Copies	Shred/Burn
Grand Master Bio Files		Permanent	Grand Lodge		
Lodge Semi Annual Returns		Permanent	Grand Lodge		
Lodge Certification of					
Installation		Permanent	Grand Lodge		
Act of Incorporation Files		Permanent	Grand Lodge		
Board of General Purposes	Minutes	Permanent	Grand Lodge		
Jurisprudence Committee	Minutes	Permanent	Grand Lodge		
Finance Committee	Minutes	Permanent	Grand Lodge		
Masonic Higher Education	Minutes	Permanent	Grand Lodge		
Benevolence Board	Minutes	Permanent	Grand Lodge		
Committee on the Work	Minutes	Permanent	Grand Lodge		
Grand Lodge Bulletin					
Committee	Minutes	2 Years			Shred/Burn
Grand Lodge Bulletin	Bulletin	Permanent	Grand Lodge	GL Library & Computer	
Fraternal Relations					
Committee	Minutes	Permanent	Grand Lodge		
Publication and Forms					
Committee	Minutes				
Deputy Grand Master					
Implementation	Minutes				
Unmasonic Conduct	UMC File	Permanent	Grand Lodge		
Bequest Files	BEQ File	Permanent	Grand Lodge		
Benevolence Files	BEN File	Permanent	Grand Lodge		
Lodge By-laws		Permanent	Grand Lodge		
Financial Records		7 Years			Shred/Burn
Auditors Reports		2 Years		Printed in Proceeding	Shred/Burn
Grand Master Conference					
of North America	Corresp	2 Years			Shred/Burn
All Canada Conference	Corresp	2 Years			Shred/Burn
Western Canada					
Conference	Corresp	2 Years			Shred/Burn
Tri-Jurisdiction	Corresp	2 Years			Shred/Burn
Lodge Summons		2 Years			Shred/Burn
Correspondence to / from					
Lodges		2 Years			Shred/Burn
Lodge Financial					
Statements	127	2 Years			Shred/Burn

