

DOCUMENT RETENTION POLICY

We Take IT for Charity Inc.

A South Carolina Nonprofit Corporation | EIN 85-3916244

Adopted: __1/1/2026__

Purpose

This policy describes how We Take IT for Charity Inc. (the "Corporation") keeps and disposes of its records. The Corporation is a small organization run primarily by its founder; this policy is intentionally simple so it can be followed consistently.

General Rules

- Records may be kept in paper or electronic form. Electronic records (PDF, scanned images, email, cloud storage) are acceptable and preferred.
- Records are kept for the time periods listed in the schedule below. After that, they may be deleted or destroyed.
- If the Corporation learns of an actual or threatened lawsuit, audit, investigation, or government inquiry, all related records must be preserved until the matter is fully resolved, even if the retention period has expired. This is called a "legal hold," and it overrides everything else in this policy.
- Records containing personal, financial, or donor information shall be stored securely and disposed of in a way that protects confidentiality (shredding for paper, secure deletion for electronic).

Retention Schedule

Record Type	Keep For
Articles of incorporation, bylaws, IRS determination letter, EIN assignment, state registrations	Permanently
Board minutes, written consents, resolutions	Permanently
Annual conflict of interest disclosure forms	7 years
Form 990 / 990-EZ / 990-N filings and supporting workpapers	Permanently
Annual financial statements, general ledger, year-end reports	Permanently
Bank statements, canceled checks, deposit records	7 years

Record Type	Keep For
Accounts payable / receivable, invoices, expense receipts	7 years
Donor records and gift acknowledgments (cash and non-cash)	Permanently
Gift acceptance file for each non-cash gift (due diligence, appraisals, custody, liquidation, disposition)	Permanently
Form 8283 (Donee Acknowledgment) and Form 8282 (Donee Information Return) copies	Permanently
Real estate deeds, title work, environmental reports, closing documents	Permanently
Contracts and agreements (active)	Life of contract
Contracts and agreements (expired)	7 years after expiration
Insurance policies	Permanently
Insurance claims records	7 years after resolution
Correspondence — routine	2 years
Correspondence — legal, tax, or significant	Permanently
Email — routine	2 years
Email — relating to gifts, donors, contracts, governance, or legal matters	Permanently or per related record
Tax returns and supporting records (federal and state)	Permanently

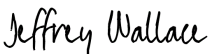
If a record type is not listed above, use good judgment: when in doubt, keep it. Records related to gifts, donors, taxes, and governance should be kept permanently.

Destruction of Records

The President is responsible for periodic review and destruction of records that have passed their retention period, provided no legal hold applies. Records containing donor, financial, or personal information must be destroyed securely.

Review

This policy shall be reviewed by the Board at least every three years.

Signed by:

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Jeffrey S. Wallace, President

We Take IT for Charity Inc.

7/7/2026
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Dr. Paul Merrick Director

7/7/2026
Date: _____

Signed by:
Kurt Fritz
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Kurt Fritz Director

7/7/2026
Date: _____