

Finance - Administration and Investments

This schedule applies to records in all formats

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
1	Agreements and contracts – general		A + 4 years	10 years	15 years	
2	Agreements and contracts – for capital property improvements and exhibitions		copy	P	P	send original, signed copy to archives, keep copies in offices as needed and appropriate
3	Board of Trustees, Finance Committee meeting minutes	minutes and supporting documents	CY + 2 years	P	P	
4	Deeds, titles, easements, mortgages, and licenses relating to real property		copy	P	P	send original, signed copy to archives, keep copies in offices as needed and appropriate
5	Investment correspondence and transaction statements	directing/confirming the purchase, sale, or transfer of stock	CY + 2 years	5 years	7 years	
6	Investment ledgers		CY + 2 years	P	P	
7	Investment statements	also known as trust statements; details of investment assets and activity	CY + 2 years	P	P	
8	Leases		CY + 6 years	0	7 years	

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9	Litigation files	includes working papers				to be determined in consultation with museum council on a case by case basis
10	Medical Center Company and University Circle, Inc. annual reports		CY + 6 years	0	7 years	UCI archives are located at the Western Reserve Historical Society
11	Securities lending activity summaries		CY + 2 years	P	P	
12	Securities lending – detailed earnings statements	these statements accompany the securities lending activity summaries	CY	0	CY	
13	Stock certificates		*P	0	*P	