



Artist's Legacy Toolkit

Sample Retention Schedule

Artistic/Production Records:

Choreographic Notes	Keep Forever
Production Videotapes	Keep Forever
Performance logs	Keep Forever
Costume designs	Keep Forever
Lighting plots	Keep Forever
Programs	Keep Forever (no more than 5 copies)

Business Records:

Board of Trustee Minutes	Keep Forever
Annual Reports	Keep Forever (no more than 5 copies)

Fiscal records:

Bank Statements	Current year + 6 years
Payroll records	Current year + 6 years

Personnel Records:

Employment histories	Keep Forever (restricted access)
W2 and W4 forms	Current year + 6 years

Public Relations:

Press releases	Keep Forever (no more than 5 copies)
News Letters	Keep Forever (no more than 5 copies)

In creating your retention schedule, it would be wise to consult your legal counsel and accountants, as well as archive specialists. The above schedule is a partial sample for illustrative purposes.