

# Document Retention Policy

*SOUTHERN TRACE HOMEOWNERS' ASSOCIATION, INC.*

## I. Introduction

Pursuant to the dedicatory instruments granting power in the Board of Directors of the Southern Trace Home Owners' Association, Inc. and as required by Texas Property Code § 209.005(m), the Board of Directors hereby adopts this Document Retention Policy. This policy sets the minimum length of time that documents will be preserved.

## II. Terms

The association hereby sets the following policy for retaining documents:

- |  |                         |
|--|-------------------------|
| 1. Dedicatory instruments including certificates of formation, bylaws, restrictive covenants, and all amendments to the certificates of formation, bylaws, and covenants | Permanently             |
| 2. Financial books and records   | 7 years                 |
| 3. Account records of current owners   | 5 years                 |
| 4. Contracts with a term of one year or more   | 4 yrs after completion  |
| 5. Minutes of meetings of the owners and the board   | 7 years                 |
| 6. Tax returns and audit records   | 7 years                 |
| 7. Records known to be relevant to litigation or potential litigation  | 10 yrs after litigation |
| 8. All other documents not previously characterized  | 5 years                 |

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BRAZOS COUNTY

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By:  
Patsy Montalbano

### III. Acknowledgment


STATE OF TEXAS

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COUNTY OF BRAZOS

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I hereby certify that , as Vice President of the Southern Trace Homeowners Association, Inc. , the foregoing Document Retention Policy were approved on the 25 day of January, 2013, at a meeting of the Board of Directors at which a quorum was present.

  
\_\_\_\_\_  
Jack Gressett  
Title: Vice President

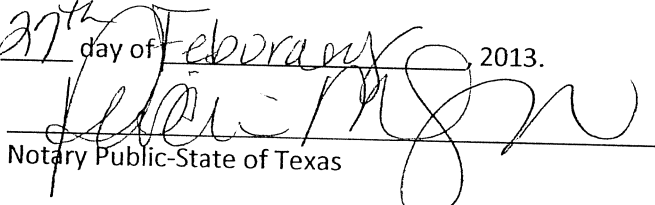
STATE OF TEXAS §

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COUNTY OF BRAZOS §

BEFORE ME, on this day personally appeared M. Jack Gressett, the Vice President of the Southern Trace Homeowners Association, Inc. , known by me to be the person whose name is subscribed to this instrument, and acknowledged to me that s/he executed the same for the purposes herein expressed and in the capacity herein stated, and as the act and deed of said corporation.

Given under my hand and seal this the 27<sup>th</sup> day of February, 2013.

  
\_\_\_\_\_  
Notary Public-State of Texas

*AFTER RECORDING, PLEASE RETURN TO:*  
Southern Trace Homeowners Association, Inc.  
c/o Association Services  
427 DELLWOOD ST  
Bryan, TX 77801 USA

