

**WILLIAMSBURG SETTLEMENT MAINTENANCE ASSOCIATION**

**RECORDS RETENTION SCHEDULE**

Revised January 2018

2  
NOTICE  
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**PERMANENT**

Articles of Incorporation  
 By-Laws  
 Deed Restrictions  
 Minutes of Board and Annual Meetings  
 Architectural Review Committee (ARC) Documentation & Exterior Modification Request (EMR)s  
 Letter granting HOA tax exempt status  
 1993/1994 Perimeter Fence Project

**SEVEN YEARS:**

Financial Information:  
 - Budgets  
 - Bank Statements (Financial Reports)  
 - Paid Invoices and Check Copies including Maintenance & Repair Records  
 - Year End Uncollected Account Records (Delinquencies)  
 - Year End General Journal Entries  
 - Property Appraisals and Reserve Studies  
 - Audit Reports  
 - Tax Returns and Payment Receipts  
 Homeowner Correspondence  
 Account records of current owners  
 Election check-in sheets (Note - Ballots and Proxies are shredded after 15 days)  
 Vendor Contracts of a term of one year or more;  
 Insurance Policies  
 Insured Property Damage Reports and reconciliations

Records not listed above are not subject to retention. Upon expiration of the retention date, the applicable records will be considered not maintained as part of the Associations books and records and will be periodically purged and paper records shredded.

WILLIAMSBURG SETTLEMENT MAINTENANCE ASSOCIATION

CERTIFICATION

I, the undersigned, being the President of Williamsburg Settlement Maintenance Association (WSMA), hereby certify that the foregoing resolution was adopted by the Association Board of Directors on the 20<sup>th</sup> day of February, 2018.

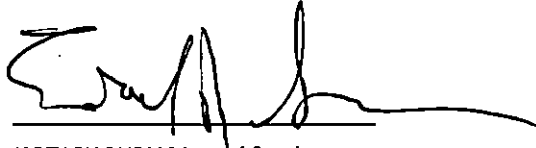
BY: Katy L Hall, President DATE: 20-Feb-2018

PRINT NAME: Katy L Hall

STATE OF TEXAS §  
§  
COUNTY OF HARRIS §

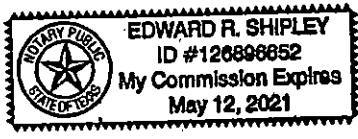
This instrument was acknowledged before me on the 20 day of February, 2018, by KATY HALL, President of Williamsburg Settlement Maintenance Association, a Texas non-profit corporation, on behalf of said corporation.

*Red  
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NOTARY PUBLIC in and for the  
STATE OF TEXAS

AFTER RECORDING  
RETURN TO: ✓  
Messock Law Firm  
17171 Park Row, Suite 250  
Houston, Texas 77084



FILED FOR RECORD

8:00:00 AM

Thursday, March 1, 2018

*Stan Stewart*

COUNTY CLERK, HARRIS COUNTY, TEXAS

ANY PROVISION HEREIN WHICH RESTRICTS THE SALE RENTAL, OR USE OF THE DESCRIBED REAL PROPERTY BECAUSE OF COLOR OR RACE IS INVALID AND UNENFORCEABLE UNDER FEDERAL LAW.

THE STATE OF TEXAS  
COUNTY OF HARRIS

I hereby certify that this instrument was FILED in File Number Sequence on the date and at the time stamped hereon by me; and was duly RECORDED; in the Official Public Records of Real Property of Harris County Texas

Thursday, March 1, 2018



*Stan Stewart*  
COUNTY CLERK  
HARRIS COUNTY, TEXAS