

**ATTACHMENT 5**  
**DOCUMENT RETENTION POLICY**

PREPARED IN THE LAW OFFICE OF:  
Baird, Crews, Schiller & Whitaker, P.C.  
Attn: Taylor Fitzner/sma  
15 North Main Street  
Temple, Texas 76501  
[www.bcswlaw.com](http://www.bcswlaw.com)

After Recording, Return To  
 Baird, Crews, Schiller & Whitaker, P.C.  
 Attn: Taylor Fitzner  
 15 North Main Street  
 Temple, Texas 76501

**DOCUMENT RETENTION POLICY  
 FOR  
 ROSEWOOD SPRINGS HOMEOWNERS' ASSOCIATION,  
 A Texas Nonprofit Property Owners' Association  
 [pursuant to Texas Property Code, Section 209.005]**

Effective Date: June 6, 2022

Homeowners' Association: ROSEWOOD SPRINGS HOMEOWNERS' ASSOCIATION  
 a Texas nonprofit property owners' association

Homeowners' Association Address: 3800 S WS Young Drive, Suite 101  
 Killeen, Texas 76542

Subdivision: ROSEWOOD SPRINGS

It is the policy of the Homeowners' Association to retain the Homeowners' Association records for the time periods set out below:

TYPE OF RECORD	RETENTION PERIOD	CODE/ACT REFERENCE
<b>ACCOUNTING</b> <ul style="list-style-type: none"> <li>• Account records of current owners</li> <li>• All other financial books and records</li> </ul>	5 years 7 years	[Property Code Section 209.005(m)(3)] [Property Code Section 209.005(m)(2)]
<b>CORPORATE RECORDS</b> <ul style="list-style-type: none"> <li>• Certificates of Formation and all amendments</li> <li>• Bylaws and all amendments</li> <li>• Restrictive Covenants and amendments</li> <li>• Minutes of meetings of the Owners and the Board of Directors</li> </ul>	Permanent Permanent Permanent 7 years	[Property Code Section 209.005(m)(1)] [Property Code Section 209.005(m)(1)] [Property Code Section 209.005(m)(1)] [Property Code Section 209.005(m)(5)]
<b>LEGAL</b> <ul style="list-style-type: none"> <li>• Contracts with a term of 1 year or more</li> </ul>	4 years after expiration of the contract term	[Property Code Section 209.005(m)(4)]
<b>PERSONNEL</b> <ul style="list-style-type: none"> <li>• Employee earnings/payroll records</li> <li>• Time cards / sheets</li> <li>• Form I-9</li> </ul>	3 years 3 years 3 years after date of hire or 1 year after date of termination, whichever is later	[FLSA, Equal Pay Act] [FLSA] [Immigration Reform & Control Act]
<ul style="list-style-type: none"> <li>• Tax Returns and Audit records</li> <li>• Payroll Tax Returns</li> </ul>	7 years 4 years	[Property Code Section 209.005(m)(6) and IRS Code] [IRS Code]

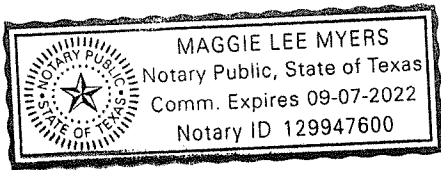
ROSEWOOD SPRINGS HOMEOWNERS' ASSOCIATION,  
A Texas Nonprofit Property Owners' Association

By: Kristin Sears  
Kristin Sears, Secretary

ACKNOWLEDGMENT

State of Texas  
County of Bell

This instrument was acknowledged before me on June 29, 2022, by Kristin Sears in her capacity as Secretary of ROSEWOOD SPRINGS HOMEOWNERS' ASSOCIATION, a Texas nonprofit property owners' association on behalf of said property owners' association.



Maggie Lee Myers  
Notary Public, State of Texas

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