

BIRCH CREEK FOREST PROPERTIES, INC.

RECORDS RETENTION POLICY

Purpose:

The purpose of this Records Retention Policy is to establish clear and legally compliant retention periods for the Association's books and records in accordance with **Texas Property Code Section 209.005 (m)**.

General Rule:

The Association will retain records for the periods required by Texas law and for any additional period necessary to protect the Association's legal and financial interests. Records not specifically listed in this policy will be retained for the period required by applicable law or for as long as the record remains relevant to the Association's operations, obligations, or interests.

Records Retention Schedule:

Governing Documents: Certificate of Formation, Articles of Incorporation, Bylaws, Declarations, amendments, and recorded policies.

Retention: Permanent, Texas Property Code Section 209.005(m)(1)

Financial Records: Budgets, ledgers, bank statements, audits, financial reports.

Retention: Seven (7) years, Texas Property Code Section 209.005(m)(2)

Owner Account Records: Ledgers, payment history, charges, adjustments.

Retention: Five (5) years, Texas Property Code Section 209.005(m)(3)

Contracts: Contracts with a term of more than one year.

Retention: Four (4) years after expiration, Texas Property Code Section 209.005(m)(4)

Minutes: Minutes of Board meetings, member meetings, and committee meetings.

Retention: Seven (7) years, Texas Property Code Section 209.005(m)(5)

Tax Returns: Federal tax returns and supporting documentation.

Retention: Seven (7) years, Texas Property Code Section 209.005(m)(6)

ACC Records: Applications, approvals, denials, correspondence.

Retention: Five (5) years after final decision

Violation Records: Notices, photos, correspondence, hearing results.

Retention: Five (5) years after resolution

Insurance Policies: Policies, endorsements, claims.

Retention: Five (5) years after expiration

Election Materials: Ballots, proxies, sign-in sheets, notices.

Retention: One (1) year after previous election

General Correspondence: Owner letters, vendor communications.

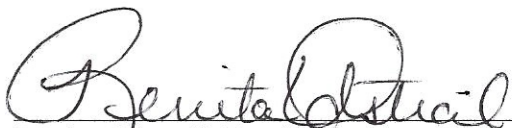
Retention: Five (5) years after sent

Litigation Hold:

If the Association becomes involved in litigation, audit, or dispute, all potentially relevant records must be preserved regardless of the retention periods listed above until the matter is fully resolved.

CERTIFICATION

We, the undersigned officers of Birch Creek Forest Properties, Inc., hereby certify that this Records Retention Policy was approved and adopted by the Board of Directors on June 06, 2026. It has been entered into the official books and records of the Association and shall be recorded in the Official Public Records of Real Property of Burleson County, Texas. This policy replaces and supersedes the prior version of this policy that was included within Document Number 2012-509, which the Board of Directors rescinded in its entirety.



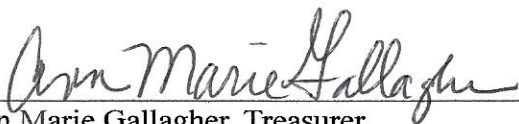
Renita Odstrcil, President



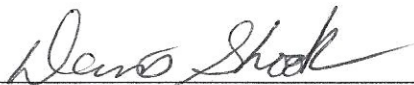
Thomas Scott Howard, Vice-President



John Dunkleman, Secretary



Ann Marie Gallagher, Treasurer



Dennis Shook, Assistant Secretary/Treasurer