Company LOGO

**COMPANY NAME**

Company Email

**Document Retention Policy**

**Accounting document retention policy**

**COMPANY NAME** will keep financial statements and accounting records for a minimum of six years. Exceptions to this include records of any purchases or assets that will last longer than six years, documents relating to which will be kept for the useful life of such assets.

**HR document retention**

HR documents including but not limited to staff records, the number of hours worked by employees, absence records, accident books, will be retained for a minimum of three years. Exceptions to this general policy are as below in accordance with GDPR Rules:

● Payroll which in accordance with the accounting document retention policy will be kept for a minimum of 6 years.

● Application and recruitment records will be retained for a minimum of 12 months.

● Parental leave records – five years (from birth/adoption) or 18 years (if child receives

disability allowance).

● Pension benefits – 12 years, from end of payable benefits.

● Redundancy records – six years.

● Personnel/training records – six years, from end of employment

**Company Record retention**

General company documentation including the following will be retained for a minimum of six years unless otherwise stated:

● Contracts and business agreements,

● Details of directors, company secretaries and members. – (Members who leave have the right to request all personal information is deleted with immediate effect).

● The records of votes and resolutions by directors and members.

● Share Transactions – For as long as the shares are actively held by the Company.

● Any loans or mortgages that are secured against assets. – for a minimum of 6 years after the term of the loan

● Physical business insurance documents and any relevant certificates - for at least seven years after the policy has finished.

**Version Control**

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| Version | Author | Date | Approved by **COMPANY NAME** |
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