

## Document Retention Policy

1 This Document Retention Policy should be read in connection with the Data Protection Policy together with our draft standard Letter of Engagement which can be found on our website at [www.simiawall.com](http://www.simiawall.com).

2 We are required by our Profession Regulators and our Professional Indemnity Providers (details of which are shown in Service Directive 2009/2999 on our website) to store clients data either in electronic or paper form from the time of receipt for effectively seven years.

### 3 Term

We have already given you notice that as long as you remain a client we will hold your electronic data for a longer period. We also asked clients to inform us if they did not wish us to retain data for a longer period and that we should either destroy the data or send it to them in a secure format.

### 4 Security

We would inform you that we have taken all the necessary steps to ensure your data is secure, however there is always an element of risk of electronic data being lost due to computer failure. However we have made adequate provision to have the data securely backed up both on our server and also in the cloud and this data is password protected.

### 5 Paper Records

Regarding paper records, they are stored in two places, one being our offices and older files in a secure store. We of course have no control over the destruction of these documents by fire, flood or any natural causes but we are fully insured should this occur.

For those clients who do not wish us to hold their paper records we will only be too pleased to collate them and arrange for them to be taken to our Liverpool Street office for collection.

Further it is our intention that once documents have been held at our secure store for seven years they will be securely destroyed.

6 With regard to ownership, all clients records are their property and we have no objection with providing you with electronic copies (or in earlier years papers copies) of working papers.

### 7 **Returning Documents to Clients**

Clients can request the return of paper documents and copies of electronic documents. There will be no charge for this service, however a client must give 28 days' notice and then attend at our Liverpool Street Office and sign for their package.

- END