

XYZ Organization Draft Document Retention Policy

Adopted/Amended __/__/20___

Section 1. Introduction	
operational reasons.	s of certain documents for legal, regulatory, and/or ("Organization") is committed to good business regulations that govern its operation.
The goal of this policy is to outline, for storing and disposing of both electrons	or employees of the Organization, proper procedures for inic and paper documents.

Section 2. Business Records

A business record is any print or electronic document created and maintained in the ordinary course of business. However, not every document constitutes a business record that must be kept. A document should be retained if it contains business activities that have evidentiary or reference value, or if it is the sole copy of a document. This includes, for example, job offers, contract negotiations where final pricing is set, or a policy memo. It does not include, for example, in-progress drafts, discussions, or negotiations, received copies of policy memos where an original already exists, or non-business correspondence.

Section 3. Record Retention Schedule

The following table lists all document types created and maintained by the Organization that qualify as business records. For each document type, a mandatory retention schedule and method of disposal have been stipulated, in addition to storage locations.

Document Type	Document Owners(s)	Onsite Storage (Years)	Onsite Storage Location	Offsite Storage (Years)	Offsite Storage Location	Total Years Stored	Method of Disposal
A. Accounting and General Records							
B. Payroll Records							

	ntion ent Retention Po ended//20_							
C. Other								
		_						
	Policy Susp							
an investigated schedule mor regulation win question	tances, this Dation, litigation ay conflict wit y procedures. Vill override the satisfactoril being dispose	, or audit is h the need If this is th is policy, ca y resolved.	s anticipated to produce te case, then ausing this p Suspension	I. In some in documents in the need to bolicy to be to of this policy.	istances, thi relevant to to comply ful temporarily cy will take	s policy's d the aforeme lly with the l suspended	isposal entioned lega law and/or until the ma	al tter
Section 5.	Policy Non-C	Complianc	e					
schedule at document, p still be retrie forward will of anyone v	ion of this pol pove. If you be please contac evable or salva have a signifi villfully disposi ation to report	elieve you he t the policy ageable, or cant positive ing of or de	nave accide administrat may exist eve impact or estroying an	ntally dispos or listed bel elsewhere a n any discipl y business c	sed of or desow immedias a copy. You inary action documents of	stroyed a be tely as the our honesty taken, if ar of Organiza	usiness document m in coming ny. If you kn	nay ow
	ee who is fou ding terminati y seriously.							
Section 6.	Contacts							
	any questions intact				or would lik	e to report	a policy	
		<u>De</u>	claration o	f Understar	nding			
I, Document F	Retention and	, have r Destructio	ead, unders n Policy.	tand, and a	gree to adhe	ere to the C	rganization'	S

Name (Printed): ______

Name (Signed): _____

Today's Date: _____