

Group Records Retention Policy – Quick Reference Guide

The Group Records Retention Policy explains our requirements to retain data and to dispose of data and provides guidance on appropriate data handling and disposal

- 1) Minimize duplication, tenure, and volume of data in our systems
- 2) Reduce data duplicates and excessive data access in terms of sensitivity and volume

Primary Records

Primary records are documents that contain data with operational value. In other words, any document that is used for work purposes. Examples include: contracts, quotations, reports, etc.



- **Primary records should be kept up to 7 years after completion of matter**



Exemptions where primary records can be kept longer



Corporate secretarial records such as annual reports, board papers and meeting minutes



Facilities Records such as building records, floor plans, construction contracts, noise pollution records



Legal Records such as intellectual property records, merger & acquisition/ joint venture records



Personal Data Records such as Privacy Act retention standards, Analytics which requires long term data history (e.g., Customer Life Cycle)



Titles/Deeds/Records such as land titles, strata titles, deeds



All other Business Records such as weekly/monthly reports, AOP, etc.

Secondary Records

Secondary records are simply duplicate/copies of primary records, they should be retained for a shorter period of time



- **Secondary records should be kept up to 3 months after completion of matter**