

Data Retention Policy Plan

COMPANY INFORMATION

Company			
Street Address			
City, State and Zip			
Website URL			
Version		Date	

VERSION HISTORY

Version	Approved By	Revision Date	Description of Change	Author

Prepared By		Title		Date	
Approved By		Title		Date	

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Please Fill in the Boxes



Purpose of the Plan

Empty box for writing the purpose of the plan.

Relevant Parties Affected by the Plan

Empty box for listing relevant parties affected by the plan.

Key Terminology

Term		Definition	

Applicable Legal Requirements

Relevant Industry Regulations

Protocol for Proper Data Retention

Protocol for Proper Data Deletion

Protocol for Proper Data Archiving

Exception Process

How to Respond to eDiscovery, Legal or Audit Requests

Responsibilities of Personnel Involved in Data Retention Activities

Responsibilities of Data Retention Team

Documents That are Considered Temporary Records

Documents That Can Be Immediately Deleted

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