

TEMPLATE

Retention Policy



Company name:

Today's date:

Launch date:

Created by:

Approved by:

Timeline for deletion:

Version number

Created by:

Description of change:

Revision date:

Approved by:

Departments
affected:

Purpose of the
policy:

Will training
be required?

Approved by:



Types of documents and other media covered by the policy and their retention periods.

Who is a member of the retention team and what are their responsibilities?

Which other employees are responsible for carrying out the policy?

Which federal, state and local government laws and industry regulations govern the documents and data covered in this policy?



Procedures for document archiving and retention:

How to respond to eDiscovery requests from the public and for audits:

Which documents are temporary records that can be deleted immediately after use.

Learn more about automated document archiving solutions