

CLIENT FILE RETENTION PERIODS

We will keep your paper matter file for a minimum of 6 years from the date of the final bill except for those documents that you ask to be returned to you. There may be occasions when it is necessary to keep archived paper files for longer periods. We keep archived paper files on the understanding that we can destroy them after 6 years from the date of the final bill.

We will keep electronic matter files for longer than the retention periods below to enable us to complete client conflict checks and for our other legitimate interests and/or to comply with our legal and regulatory obligations. We may transfer archived paper files held in storage to electronic or digital form. If this happens and we are subsequently asked to retrieve a file we will supply you with a reconstituted paper file or one in electronic/digital form. We review our file retention periods for paper and electronic files annually.

We do not normally make a charge for retrieving stored papers or deeds in response to continuing or new instructions to act for you. If you require us to retrieve documents for some other purpose we reserve the right to make a charge. If we are also acting for your lender or another client in the same matter, for example your spouse/partner or business partner, we may not be able to release our file without the consent of such organisation or person.

Matter Type	Usual retention period (Time limits run from the last date work was carried out on the file)
Conveyancing Sales	6 years
Conveyancing Sales of part	12 years
Conveyancing Purchases	12 years
Probates - fully wound up and distributed	6 years
Probates - with continuing Trust or life interests	Indefinitely
Wills	Retain until fresh Will made or Testator dies
Family matters	6 years
Family - (where ongoing trusts for children)	6 years from 18th birthday of youngest child
Civil Litigation – no disability, minority or provisional damages	6 years
Civil Litigation – minority Client, or disability	6 years from date where conditions end
Provisional Damages	Indefinitely
All other matters	6 years

Deeds – after completion of a property purchase we will send the deeds, usually to you or to your lender if requested. If you ask us to deposit your deeds they will be retained in safe storage.

Wills – we have facilities to store Wills on your behalf and these will not be released to persons other than the Testator, Executors/Administrators of the estate in the event of the Testator’s death.

We do not charge for Will storage. Original Wills, deeds and other documents you ask us to deposit will not be destroyed and are retained by us in safe custody. We may ask you to show us proof of your identity before accepting documents for storage or releasing documents to you.