

Data retention policy

September 2021

Your Data will be kept for certain periods after your retainer with us has terminated. The periods for which we will retain Your Data depends on the practice area under which we provided our services to you. The periods are as follows:

Practice area	Retention period
Abortive transaction/matter did not proceed	Discretionary decision by Legal Staff and Supervising Partner (for example, if no engagement letter was sent or received) – 1 year as a guide. Data received via Settify will be kept for 2 years.
Beneficiary information/data	7 years, unless there is a will trust, in which case until the trust end date plus 7 years.
Corporate Commercial	12 years or longer if it involves complex issues.
Criminal	7 to 15 years (depending on the seriousness of the crime) or longer if a life or indeterminate sentences have been imposed.
Employment	7 years.
Family	15 or 21 years (for example, if children are involved).
Leasehold and Tenancy	7 years or length of term of tenancy/lease plus 3 years.
Litigation	12 years or longer if necessary (for example, if you are disabled).
Medical Negligence	15 years or longer if it involves children or complex issues (for example, lifetime or provisional damages being awarded).
Personal Injury	7 to 15 years or longer depending on the complexity of the case (for example, lifetime or provisional damages being awarded), the seriousness of the injury or if children are involved.
Private Client (non-litigious)	7 years.
Property Purchase and Mortgage	15 years.

Practice area	Retention period
Property Re-Mortgage	7 years.
Property Sales	7 years.
Trusts	For the duration of the trust and then an additional 7 years.
Wills and Probate	Indefinitely (if in keeping with a will or trust) or 21 years.

Any data held to comply with our obligations under anti-money laundering regulations as may be in force will be held for 5 years from the date of the last active matter's file closure, with a long stop date of 10 years. Please note that we may keep Your Data for longer than the periods stated above if it is necessary. However, this will be assessed on a case-by-case basis. If we determine that it is necessary to keep Your Data for longer than the periods listed above, we will confirm this to you in writing at the end of our retainer with you and explain why it is necessary.

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