
Policy: Document Retention and Disposal Policy

1. Summary

- 1.1. This policy defines WINNS Services Document Retention and Disposal Policy to ensure it meets requirements.
- 1.2. The Finance Director is responsible for the implementation and management of the Document Retention and Disposal Policy.

Rev.	Date	Nature of Changes	Approved By
1	12 th September 2022	Original issue.	C Stebbing
2	27th February 2023	Full Review	Full Team

2. POLICY: Document Retention and Disposal Policy

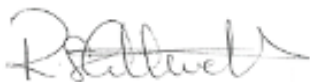
WINNS believe that Information held for longer than necessary carries additional risk and cost. Records and information are only retained when there is a business need to do so. Under UK GDPR personal data processed by WINNS will not be retained for longer than is necessary for its lawful purpose.

The default standard retention period for WINNS records is 6 years plus current, otherwise known as 6 years + 1. This is defined as 6 years after the last entry in a record followed by first review or destruction to be carried out in the additional current (+ 1) accounting year.

Records are only retained beyond the default WINNS retention period if their retention can be justified for statutory, regulatory, legal or security reasons or for their historic value, This is authorised by the Managing Director.

The maximum retention period for WINNS records identified as having historic value is defined as 20 years after the last entry in the record, with an additional one calendar year for final review and transfer or destruction.

The Finance Director is responsible for the disposal of records after the retention period.



Signed Date: 27th February 2023

Managing Director