

Hextalls Law Data Retention Policy

Introduction

Hextalls Law is committed to complying with the requirements of applicable data protection legislation including the UK GDPR and the Data Protection Act 2018. This is to ensure that our clients' data and that of employees and third parties is properly protected. This is our policy in relation to how we will retain and delete data across all our business activities.

Application

This policy applies to all our employees and everything we do as a business. All employees must familiarise themselves with the policy and comply with it. In accordance with data protection legislation, we will not retain personal data for longer than is necessary and we have systems in place to ensure compliance with our data protection obligations.

Data retention

Retention of personal data depends on the subject matter. There are several factors affecting how long we might keep personal data, including our legal obligations, the need to protect our business, our ongoing obligations to clients and the services we provide to them, our professional conduct requirements and legislative and regulatory requirements. Clients may occasionally ask us to keep data for longer than would ordinarily be the case, for example if we hold a file containing deeds or someone's will.

The data we hold is in several different formats, examples of which include emails, file notes, attendance notes, letters and other documents. These can be in paper or electronic form although since 2018 most of our work is done electronically. Where we use paper, this is usually duplicated electronically and at the conclusion of any case, the paper files are normally destroyed and will only be kept where there is a good reason to do so (which will usually be that there is a specific document, the original of which must be retained).

We do not seek to keep information longer than is necessary. It is also impractical for us to retain all documents and records and we undertake regular reviews to ensure that files are promptly closed and data is dealt with appropriately.

Our general approach is to hold personal data for no longer than six years after it ceases to be current unless there is a specific reason for doing so. Whether data is current will vary according to the circumstances. For example, we may obtain data in relation to a witness on a case that remains open for

several years after the data is obtained. During that time, the witness's personal data is likely to remain current so we would then keep the information for at least six years after that.

Where we archive files, we will not access them or use that data unless there is a specific reason for doing so, which will usually be that the client requires some information from an old file or the information becomes current once again.

We have produced a data retention schedule covering our business operations. This can be found [here](#).

Hextalls Law Data Retention Schedule

Category	Type of Data	Retention Period	Purpose	Action Following Retention Period	
Payroll	Payroll Records	Current Tax Year + 6	Legal obligations	Destroy	
Accounts	Accounts Information	Current Year + 6	Legal obligations	Destroy	
Human Resources	Current Staff Details/Records	Keep whilst employed	Legal obligations	Keep	
	Former Staff Details/Records	Leaving date + 6	Legal obligations	Destroy	
	Pension Records	Keep	Legal obligations	Keep	
	Training Records	Leaving date + 6	To comply with SRA policy	Destroy	
Health and Safety	Health and Safety Records	40 years	Legal obligations	Destroy	
	Fire Safety Certificates	Keep	Legal obligations	Keep	
	Fire Risk Assessment and Fire Plans	Keep	Legal obligations	Archive	
Insurance	Insurance Policies except EL	12 years	Legal obligations	Archive	
	Employers Liability Policy	Permanent	Legal obligations	Archive	
Client & Case Information	Personal Data	Date of completion of file + 6	Legal obligations SRA policy	Archive	
	Digital or physical files, which will include personal data relating to non-clients	Date of completion of file + 6	Legal obligations SRA policy	Archive	
	Emails on cases held in Outlook	Date of completion of file + 6	Legal obligations SRA policy	Destroy	
Supplier	Personal Data of suppliers	Termination date + 6	Policy decision	Archive	

Information	Supplier Agreements	Termination date + 6	Legal obligations	Destroy	
	Emails	Termination date + 2	Policy decision	Destroy	

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