Ashford Business Services Ltd

Document Retention Schedule

How long each type of record is kept, what triggers the retention period, what happens at the end of it, and a log of destruction and review.

Organisation: _____

Schedule owner: _____

Date this schedule was approved: _____

Approved by: _____

Date of the next review: _____

Rules for using this schedule 1. The retention period runs from the trigger stated in the schedule row, not from the date a document was created, unless the row states otherwise. Do not destroy a record before its period ends.

2. Where a matter is under review, dispute, investigation, or audit, a hold overrides this schedule: do not destroy anything relating to that matter until the hold is lifted in writing by Sarah Mitchell**.**

3. Destruction must be authorised and recorded in the destruction log. Paper records for destruction must be securely destroyed; electronic records must be deleted from live systems and, where applicable, from backups on their normal cycle, and the deletion must be verifiable.

4. Where a retention period is set by a law, regulation, contract, or funder requirement that applies to your organisation, that requirement prevails over this schedule, and the schedule row should name the requirement in the notes column.

5. Review this schedule on the rhythm stated above, and whenever a relevant requirement changes, a new record type is created, or a system changes.

Retention schedule

Record type	Description and scope	Owner	Retention period	Trigger for the period	Disposition at the end	Location and format
Employee records	Description and scope of this record type	James Patel	November 2026	November 2026	November 2026	Boardroom, 12 Church Street, Birmingham
Financial records	Description and scope of this record type	James Patel	November 2026	November 2026	November 2026	Boardroom, 12 Church Street, Birmingham
Client contracts	Description and scope of this record type	James Patel	November 2026	November 2026	November 2026	Boardroom, 12 Church Street, Birmingham
Health and safety records	Description and scope of this record type	James Patel	November 2026	November 2026	November 2026	Boardroom, 12 Church Street, Birmingham
Meeting minutes	Description and scope of this record type	James Patel	November 2026	November 2026	November 2026	Boardroom, 12 Church Street, Birmingham
Supplier invoices	Description and scope of this record type	James Patel	November 2026	November 2026	November 2026	Boardroom, 12 Church Street, Birmingham
Employee records	Description and scope of this record type	James Patel	November 2026	November 2026	November 2026	Boardroom, 12 Church Street, Birmingham
Financial records	Description and scope of this	James Patel	November 2026	November 2026	November 2026	Boardroom, 12 Church

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Record type	Description and scope	Owner	Retention period	Trigger for the period	Disposition at the end	Location and format
	record type					Street, Birmingham
Client contracts	Description and scope of this record type	James Patel	November 2026	November 2026	November 2026	Boardroom, 12 Church Street, Birmingham
Health and safety records	Description and scope of this record type	James Patel	November 2026	November 2026	November 2026	Boardroom, 12 Church Street, Birmingham

Schedule key: disposition terms

Secure destruction: Destroy so the record cannot be reconstructed, by a method appropriate to its format, and record the destruction in the log below.

Archive: Transfer to long-term archive storage, with access limited and retrieval recorded; do not destroy.

Review: Review at the end of the period and decide, with approval, whether to retain further, archive, or securely destroy, and record the decision.

Return: Return the record to its owner or originator as required, and record the return in the log below.

Destruction and return log

Date of destruction or return	Record type	Period covered	Authorised by	Method used	Certificate or reference
9 November 2026	Meeting minutes	November 2026	James Patel	Method used	JOB-1042
9 November 2026	Supplier invoices	November 2026	James Patel	Method used	JOB-1042
9 November 2026	Employee records	November 2026	James Patel	Method used	JOB-1042
9 November 2026	Financial records	November 2026	James Patel	Method used	JOB-1042
9 November 2026	Client contracts	November 2026	James Patel	Method used	JOB-1042
9 November 2026	Health and safety records	November 2026	James Patel	Method used	JOB-1042
9 November 2026	Meeting minutes	November 2026	James Patel	Method used	JOB-1042
9 November 2026	Supplier invoices	November 2026	James Patel	Method used	JOB-1042

Schedule review

Review date	Reviewed by	Changes made	Approved by
9 November 2027	James Patel	Changes made at this review	Helen Morris

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9 November 2027	James Patel	Changes made at this review	Helen Morris
9 November 2027	James Patel	Changes made at this review	Helen Morris
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Summary

Record types in the schedule: _____

Record types with no owner assigned: _____

Destructions recorded since the last review: _____

Holds currently in force: _____

Date of the next review: _____