

Brian Harris & Co – Records retention Schedule

Record	Retention period
Trusts	End of trust period or date of vesting plus 6 years Documents relevant to VAT liability—6 years Tax papers—12 years after the end of the trust period Administration files—end of trust period plus 6 years
Matters on behalf of minors	6 years from the date of the client attaining 18 years
Wills	Indefinitely (subject to review after notification of the date of death of the testator and probate)
Tax	12 years after the end of the period of assessment
Financial services (transactions and commissions effected or received under the SRA Financial Services (Conduct of Business) Rules 2001)	6 years
All other client matter files	6 years

The above retention periods are subject to review and your file and/or data might be retained longer or shorter depending on the type of data and the legal services provided, the complexity of the case and the storage format, which will be assessed on a case by case basis.

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