



Document title:	Data Retention Schedule
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Revisions History:

Date:	Author:	Description:
30.04.2025	Lindsey Connolly	Introduction of schedule for client access

This Data Retention Schedule outlines how long Thomas Flavell & Sons retains personal data in line with our regulatory obligations, business needs, and data protection principles. It supplements our Privacy Notice and reflects the nature of work we carry out.

We retain personal data for only as long as necessary for the purpose for which it was collected, unless a longer retention period is required or permitted by law. Below are our standard retention periods by matter type or data category.

Data Type / Matter Type	Retention Period	Notes
Commercial Property & Corporate files	15 years	Stored electronically.
Conveyancing Sale files	7 years	Stored electronically.
Conveyancing Purchase files	15 years	Stored electronically.
Family and Litigation files	15 years	Stored electronically.
Probate files	25 years	Stored electronically.
Will writing instructions	25 years	Stored electronically.
Wills, Deeds, and securities held in safe custody	Indefinitely	We will not destroy these unless instructed.
Prospective client data (no instruction or advice given)	2 years	Data removed after 2 years if no formal instruction is made.
Complaints and claims records	6 years	Retained for legal and regulatory defence purposes.
Call recordings on a client file	In line with the above retention period for the relevant area of law	Retained for legal and regulatory defence purposes.
Marketing preferences and contact information	Until consent withdrawn or after 5 years of inactivity	Reviewed periodically.
Financial records (payments, invoices)	7 years	To comply with tax and financial reporting obligations.
AML and identity verification records	In line with the above retention period for the relevant area of law	Retained for legal and regulatory defence purposes.

This schedule is reviewed annually and may be updated to reflect changes in legal obligations or internal policy.