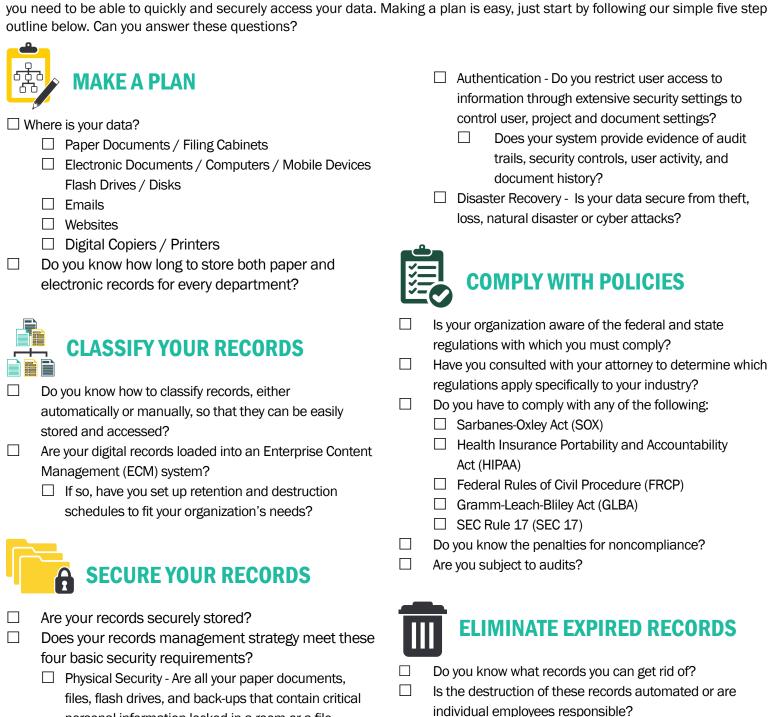
Document Retention Checklist



Does your organization have a formal, written, records retention policy in place? In many industries, organizations are unsure of what they should or shouldn't be keeping and by default, many just keep everything. However, keeping it all is not good records management. If your organization is ever involved in litigation or a regulatory inquiry where you have to produce information, you need to be able to quickly and securely access your data. Making a plan is easy, just start by following our simple five step outline below. Can you answer these questions?





Who are the individuals involved?

can be destroyed?

Can you consistently determine what records

personal information locked in a room or a file

☐ Electronic Security - Are your electronically stored

documents protected from attacks and breaches with encryption both during transmission and at rest?

cabinet that is secure?