

CAMRADATA Analytical Services Ltd trading as Fund Europe Retention Schedule

Publish Date	1st May 2018
Review period	1 year
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TYPE OF INFORMATION	RECOMMENDED RETENTION PERIOD	RATIONALE & NOTES
Contracts & Agreements		
Client agreements for the provision of services	6+1 years after the client terminates the agreement for the provision of services	Limitations Act 1980
Sales & Marketing		
Consents for all types of direct marketing	Retain consents while contact is still on active marketing contact lists	Data Protection Act, Business Interests
Unsubscribes	Retain unsubscribes notifications permanently	To enable unsubscribe request to be carried out and to ensure contact is not contacted again in the future or until such time as they opt back in.
Information Management		
Retention and disposal schedules	Permanent – Life of business	BSI 10008
Procedure manual, guides and instruction on the management of records	Permanent – Life of business	BSI 10008
Business Continuity Plan	Until superseded	Best practice
Customer/Client Records		
Business relationships	6+1 years from the date when all activities in relation to the business relationship were completed or concluded whichever is the later	Best practice

TYPE OF INFORMATION	RECOMMENDED RETENTION PERIOD	RATIONALE & NOTES
Incorporation Documents		
Certificate of Incorporation (original)	Permanent	Implied by the Companies Act 1985, Sec.13
Memorandum and articles of association (signed and copy of original)	Permanent	Implied by the Companies Act 1985, Sec.13
Minutes of Board meetings	Permanent	Implied by the Companies Act 1985, Sec.13