

Record Retention Policy

Document Name	Retention Period
Accounting	7 years
Advisen Reports	2 years
Agency Bill - Administrative Services	7 years
Agreements/Contracts	7 years
Applications	7 years
Applications/Spreadsheets	7 years
Appraisals	7 years
Attachments	7 years
Audits	7 years
Binders	7 years
Bonds	7 years
Cancellations	7 years
Carrier Notices and Newsletters	7 years
Census - Client ePHI	18 months
Certificates	2 years
Change Requests	7 years
Claims	7 years
Correspondence	7 years
Coverage Verification	7 years
Declinations of Coverage	7 years
Deduction Notices	1 year
Diagrams	7 years
Emails (Generic - non client content)	1 year
Emails (To/From client or Company)	7 years
Email Encryption Software	7 years
Endorsements	7 years
Evidence of Property	2 year
Evidences	2 years
Executive Summaries	7 years
Experience Modification Worksheets	7 years
Expiration Lists	7 years
Exposure Checklists/Checklist	7 years
Fact Sheets	7 years
Financials	7 years
Forensic Audits	7 years
Invoices from Others	7 years
Letters	7 years
Loss Control	7 years
Loss Runs	7 years
Loss Summaries	7 years
Lost Policy Releases	7 years
Marketing Control Sheets	7 years

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Document Name	Retention Period
Marketing Summaries	7 years
Memos	7 years
MVRs	2 years
Off Site Storage (if applicable)	7 years
Payroll Authorizations	1 year
Photos	7 years
Policies	7 years
Premium & Exposure Analysis	7 years
Premium Allocations	7 years
Presentations	7 years
Proposals	7 years
Prospects	7 years
Quotes	7 years
Reinstatements	7 years
Reports from Others	7 years
Schedules	7 years
Spreadsheets	7 years
Submissions to carriers	7 years
Summary of Coverage	7 years
Surplus Lines	7 years
Survey's	7 years
Tasks	2 years
Underwriting Information	7 years