

HENDERSON ASSET MANAGEMENT, LLC

2025 Records Retention Policy

HENDERSON ASSET MANAGEMENT, LLC, retains client records for ten years following the end of a relationship, or from the beginning of the time our firm began working with a client.

Records are maintained electronically in adviser's hard drive, an external backup, at the custodian, and in the cloud.

Records prior to January 2020 may be electronic and paper, or one or the other.