

## SVJ Consulting data retention schedule

Type of record	Retention period	Where is it stored?	Reason	Method of deletion
Email correspondence	Archive emails after 24 months	Outlook	For reference in ongoing or repeating projects	Outlook archive tool
Mailing lists	12 months after last action	N/A – don't currently use mailing list	Information updates or marketing purposes	Mailing list cleaning tool
Personal data collected via research surveys	24 months after survey close	(SaaS) platform used to create, distribute and analyse online surveys	To enable response to follow-up queries from client	Manual with automated reminders
Contracts	Indefinitely	Microsoft OneDrive	Legal and audit	n/a
Purchase orders and invoices	Indefinitely	Microsoft OneDrive	Legal and audit	n/a
Tax returns	Indefinitely	Microsoft OneDrive	Legal and audit	n/a
Accounting & financial management information	Indefinitely	Microsoft OneDrive	Legal and audit	n/a

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