

FERN Coaching and Mentoring		
Record Type	Retention Period	Comments
Client Agreements/Contracts	6 years after termination	Limitation Act 1980
Session Notes	6 years after termination	
Assessments and Evaluations	6 years after completion	
Invoices and Receipts	6 years	HMRC requirements
Bank Statements	6 years	
Expense Reports	6 years	
Tax Returns	6 years	HMRC requirements
Business Licenses and Permits	Permanently	
Insurance Policies	Permanently/6 years	6 years after expiration if no claims
Leases and Contracts	6 years after termination	
Business Plans	Permanently	
Meeting Minutes and Agendas	Permanently	
Training Materials	Until obsolete	
Marketing Materials	Until obsolete	
Health and Safety Records	3 years after termination	Health and Safety at Work Act
Emails	2 years	Unless otherwise specified
Client Management Data	6 years after termination	
Website Analytics	2 years	