

[Company Name]
[Address]
[City, State, Zip Code]
[Date]

[Client Name]
[Client Address]
[City, State, Zip Code]

Subject: Document Retention Policy for Engagement Letter

Dear [Client Name],

This letter serves to outline our policy regarding the retention and destruction of documents related to our professional engagement with [Client Name]. This policy applies to all records, including the original Engagement Letter, work papers, and any supporting documentation provided during the course of our services.

1. Retention Period

Our firm will maintain all records related to this engagement for a period of [Number, e.g., 7] years following the completion of the services or the termination of the engagement. This period ensures compliance with professional standards and legal requirements.

2. Client Responsibility

At the conclusion of the engagement, we will return any original records provided by you. It is your responsibility to maintain your own copies of all essential documents for your tax and business records.

3. Disposal of Records

Upon the expiration of the retention period specified above, [Company Name] reserves the right to destroy all physical and electronic documents related to this engagement without further notice to you. Destruction will be performed in a secure manner to protect your confidentiality.

4. Access to Records

During the retention period, you may request copies of your records. Please note that providing such copies may be subject to administrative fees.

By signing the attached Engagement Letter, you acknowledge and agree to the terms of this Document Retention Policy.

Sincerely,

[Your Name]
[Your Title]
[Company Name]