

Records Retention Schedule Builder

Map record classes to owners, systems, legal or business rationale, retention trigger, minimum period, hold rules, disposal, and proof.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid RiskWise engagement.

What this free resource includes

01 Record inventory

02 Authority and purpose

03 Retention trigger and period

04 Legal holds and access

05 Disposal and evidence

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through Records Retention Schedule Builder

Record what is known, identify the source, assign an owner, and make missing information visible.

Record inventory

Purpose / facts / owner / evidence / date:

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Authority and purpose

Purpose / facts / owner / evidence / date:

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Retention trigger and period

Purpose / facts / owner / evidence / date:

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Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Legal holds and access

Purpose / facts / owner / evidence / date:

Disposal and evidence

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	RiskWise can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: Records Retention Schedule Builder

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