

The purpose of this document is to provide guidance on the retention and disposal of documents (including “personal data” under the General Data Protection Regulation 2016/679 ("GDPR"), and the Data Protection Act 2018 (subject to royal assent, the “DPA”)) (together the "Data Protection Laws"). “Documents” in this context means all documents held or controlled by us in any format or media that are located in the UK.

As a matter of law, our documents (including books, records and financial reports) must accurately reflect the underlying transactions and represent the true state of the business. They are an essential part of doing business correctly, honestly and openly and protect us, our customers and those we work with. We must ensure that the record keeping of our documents is accurate, that we store them safely and for the time periods prescribed by the law and that we do not destroy or alter any information or data that must be kept for litigation, an investigation or other legal reasons. Equally, we must not retain documentation where the limitation period has expired and there is no legal justification for retention.

The retention schedule sets out the recommended retention periods for Property records. The retention schedule is intended to enable users of this document to simply refer to the relevant type of document that they are interested in and then determine the relevant retention period from that schedule. If a document is not covered by any retention schedule, reference can be made to the items listed in the General Guidance section within the Records Management Policy in determining an appropriate retention period.

SBU/functions should refer to these retention schedules and the general guidance below in reviewing their current existing document retention and disposal practices.

The DPO within the SBU/function has the responsibility for establishing and implementing effective practices and procedures across it to give effect to this document.

Property documents

Record description	Retention period	Form in which to be kept	Reason and comments
Property - general			
Deeds of title	Permanently or until delivered to a purchaser on disposal	Original	Documents of title will be transferred to new freeholder on disposal.
Leases	15 years after expiry or termination of lease and all liabilities under lease	Original	Limitation.
Subletting agreements	15 years after expiry or termination	Original	Limitation.
Wayleave agreements	12 years after expiry or termination	Original	Limitation.
Landlord’s consents	15 years after surrender, expiry or termination of lease or memorandum of terms	Original	Limitation.
Licences	15 years after surrender, expiry or termination	Original	Limitation.
Planning consents	12 years after land sold	Original	Limitation.

Record description	Retention period	Form in which to be kept	Reason and comments
Listed building consents	12 years after land sold	Original	Limitation.
Rating authority documents	12 years after land sold	Any	Limitation.
Agreements with contractors and consultants, including architects, builders etc	15 years after completion of contract	Original	Limitation.
All property correspondence (eg. inspection notices served on land owners)	12 years after land sold	Any	Limitation.
Property search results	12 years after land sold	Any	Limitation.
Formal notices served by statutory bodies	12 years after land sold	Any	Limitation.
Warranties and indemnities	12 years after land sold	Any	Limitation.
Local authority documents (eg. council tax documents)	12 years after land sold	Any	Limitation.
Business rates documents	12 years	Any	-
Property VAT election notices	12 years	Any	-
Surveys and inspections	Permanently	Any	-
Information, records or correspondence required under or for claims re the Building Safety Act 2022 (BSA) or Fire Safety (England) Regulations 2022 or Defective Premises Act 1972 including without limitation, building safety information or records, plans, reports, assessments or certificates safety cases and prescribed information under BSA golden thread requirements	For dwellings in relation to which claims have accrued before 28 June 2022 - 30 years from completion For dwellings in relation to which claims have accrued after 28 June 2022 - 15 years from completion	Original hard copy and digital copy. Format to meet BSA 'golden thread' requirements once available.	the Building Safety Act 2022 (BSA), Fire Safety (England) Regulations 2022 and Defective Premises Act 1972 as amended.
Reports			
Architectural reports	25 years	Any	Best practice.
Structural engineering, mechanical and electrical engineering and drainage services reports	15 years	Any	Best practice.

Record description	Retention period	Form in which to be kept	Reason and comments
Building condition surveys	25 years	Any	Best practice.
Asbestos inspections	40 years	Any	Best practice.
Conservation reports (historic and listed buildings)	25 years	Any	Best practice.
Maintenance records			
Maintenance contracts	15 years after expiry	Original	Limitation.
Maintenance schedules and programmes	15 years after expiry	Any	Limitation.
Maintenance log	15 years after expiry	Any	Limitation.

Records of other property assets			
Asset registers	Permanently	Any	Historical entries should be kept for at least 6 years after assets they record are sold, transferred, written off etc.
MOT certificates	Until vehicle sold	Original	Best practice.
Vehicle registration documents	Until vehicle sold	Original	Document of title.
Vehicle maintenance logs	Until vehicle sold	Original	Best practice.