



The Ernest & Marjorie Fudge Trust For Warminster

Document Retention Policy

- Purpose: to ensure Data Protection criteria is adhered to by the Trustees of The Ernest and Marjorie Fudge Trust for Warminster
1. All Trustees are required to ensure that confidential papers relating to individual applications are destroyed as soon as possible following the Quarterly Meeting at which they were discussed unless there is good reason for retaining i.e. further investigation is required or there is agreement to take forward to the following Quarterly Meeting etc.
 2. On ceasing to be a Trustee of The Ernest and Marjorie Fudge Trust for Warminster, all Fudge Trust paperwork should be returned to the Clerk or the current Chairman.
 3. All Trustees undertake to ensure that family and/or close friends are aware of this policy and that contact details of the Clerk and Chairman are easily available.
 4. The Clerk will retain important original documents i.e. the Constitution, Policies, latest Bank Mandates etc. In relation to applications and other papers, records will be kept for seven years after which paper and electronic records will be destroyed.
 5. On the Trust's website, a link guides the viewer and potential applicants to the Trust's Privacy Notice.

Approved by Trustees at their Quarterly Meeting held on 3rd December 2018

For Clerk's reference : (Original document approved 11th September 2017)