

Email Retention Policy Template

[ORGANIZATION NAME] Email Retention Policy

Version: [X.X] · Effective Date: [DATE] · Review Date: [DATE]

Owner: [Records Manager / Compliance Officer / IT Director]



1. Purpose

This policy establishes requirements for the retention, storage, and deletion of email communications at [Organization Name] to ensure legal compliance, operational continuity, and appropriate records management.

2. Scope

This policy applies to all employees, contractors, and third parties who use [Organization Name] email systems, including all mailboxes (personal, shared, distribution lists, and service accounts).

3. Retention Schedule

Email Category	Description	Retention Period	Storage Location
Financial	Invoices, approvals, expense records	7 years	[SharePoint Finance library]
Legal	Contracts, claims, regulatory	7–10 years	[SharePoint Legal library]
HR	Hiring, disciplinary, termination	Employment + 7 years	[SharePoint HR library]
Client	Project correspondence, approvals	Relationship + 3 years	[SharePoint / Teams project]
General business	Operational decisions	3 years	[SharePoint]
Transitory	Logistics, announcements	1 year	Inbox / delete

4. Legal holds

When litigation, regulatory investigation, or audit is anticipated, [designated authority] will issue a legal hold notice suspending normal deletion for affected emails. Employees must acknowledge receipt and preserve all relevant email until the hold is lifted.

5. Deletion

Emails that have reached the end of their retention period will be deleted according to [process]. Deletion of emails subject to a legal hold is prohibited.

6. Employee responsibilities

- **Save to SharePoint or Teams**

Save emails with business value to the designated SharePoint or Teams location at the time of sending or receipt.

- **Apply correct metadata**

Apply the correct category or metadata when saving emails to ensure proper classification.

- **Preserve held emails**

Do not delete emails that may be subject to a legal hold.

- **Report non-compliance**

Report suspected non-compliance to [contact].

7. Enforcement

Non-compliance with this policy may result in disciplinary action. [Organization Name] reserves the right to audit mailboxes and storage locations to verify compliance.

8. Review

This policy will be reviewed every two years or following material changes in applicable regulations.