

FORM 3: Disposition and Destruction of Client Files Clause

Ed. note: Lawyers have a duty to review client files prior to shredding or deletion to ensure original documents, or other documents of value, such as share certificates or cash/cash equivalents, have been returned to the client. However, this form allows you to advise clients at the time of retention that you will safely shred or delete their files after four years, unless required by law to maintain them longer, such as with actions involving trusts or minors. This form duplicates some of the “copy charge” language of Form 2 above, so such duplication should be edited out if these forms are combined.

Disposition of Client Files: At the conclusion of this matter, Client is advised that all matters in the Client's file shall be returned to Client upon request. Client is further advised to retain all confidential information or original documents from Attorney's file. Client otherwise authorizes Attorney to destroy in a secure manner the information contained in Attorney's file after four years from the date the legal service is completed. If you want a copy of your file at any time, we shall deliver it to you in the same format in which the file is maintained in our office. If you desire paper copies of files or data which we have solely maintained in digital format, we will either provide you the digital copies as well as making you the paper copies at an additional expense, or cooperate in delivering your digital file to a copy printing service of your choice so that your selected copies may be made at your expense.