



LONCAR LYON JENKINS

Data Retention and Disposal Policy

This policy describes the firm's general approach to retaining, archiving, deleting, and securely disposing of website, communication, intake, business, and legal records.

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Review cycle	At least annually and after a material legal, security, operational, or technology change
Classification	Public trust and compliance information

1. Purpose

Loncar Lyon Jenkins retains information only as long as needed for legal representation, prospective-client review, business operations, communication preferences, security, compliance, accounting, dispute resolution, professional responsibility, and other lawful purposes.

2. Scope

This policy covers website submissions, consultation requests, call and SMS records, marketing preferences, client and case records, business records, vendor records, analytics, security logs, backups, exported files, and temporary working materials handled by firm personnel or approved service providers.

3. Retention principles

- Use approved systems for firm records and avoid unnecessary local copies.
- Retain records according to applicable law, professional duties, court rules, client instructions, legal holds, contracts, and firm policy.
- Suspend deletion when a legal hold, dispute, audit, investigation, or security review applies.
- Dispose of information using methods appropriate to the sensitivity and storage medium.
- Protect SMS consent and opt-out records and do not share mobile opt-in data for marketing purposes.

4. Operational retention schedule

Record category	Typical retention	Disposition
Website inquiries and consultation requests	As needed to respond, evaluate conflicts, support client intake, and comply with business or legal duties.	Retain in approved systems or securely delete when no longer needed.

Record category	Typical retention	Disposition
Client and case records	According to firm policy, ethical duties, court rules, client instructions, and applicable law.	Archive, return, transfer, or destroy through approved legal-record procedures.
SMS opt-in, consent, and support records	As needed to document consent, honor opt-out requests, and comply with messaging requirements.	Do not share opt-in data for marketing; preserve opt-out evidence as needed.
Billing, vendor, and accounting records	Generally retained for tax, accounting, audit, and business requirements.	Secure deletion or destruction after retention requirements expire.
Security, access, and system logs	Limited operational windows unless needed for investigation, fraud prevention, legal hold, or security review.	Expire automatically or securely delete after the applicable period.
Temporary exports and working files	Only as long as needed for the authorized purpose.	Delete from temporary storage and avoid unapproved local copies.
Backups	Rolling retention according to the backup platform and recovery needs.	Encrypted expiration, replacement, or destruction on schedule.

5. Legal holds and preservation

Routine disposal is suspended when information may be relevant to a legal hold, claim, investigation, subpoena, court order, insurance matter, professional duty, security event, or dispute. Preserved information is limited to the scope of the hold where practical.

6. Disposal methods

Approved disposal may include secure deletion, encrypted expiration, destruction of paper records, de-identification, vendor-assisted removal, backup expiration, or transfer/return of records when required. Disposal of client and case materials is handled according to applicable legal and ethical obligations.

7. Privacy requests

Individuals may contact the firm with privacy questions or requests. The firm will evaluate requests according to applicable law, professional duties, legal holds, identity verification needs, and operational requirements.

8. Review

This policy is reviewed at least annually and after material changes in law, operations, vendors, systems, or firm procedures.