

Information Retention and Deletion Schedule – Contracts, Sales and Marketing TCB & TCPC

Information description	Retention period - THOMAS CARROLL
Prospective Clients	3 years from the date consent has been obtained
Existing Client	Records will be retained for as long as you remain an existing client
Previous Client (no current product or service in place)	6 years after the client is lapsed. Unless we requote during this period, in which case data will be kept for 3 years from the consent to quote date
Claim files	6 years from settlement
Emails	6 years
Complaints	3 years from the date that the complaint was received
Call Recordings	Indefinitely

Information Retention and Deletion Schedule – Contracts, Sales and Marketing – TCMS

Information description	Retention period – Thomas Carroll
Prospective Clients	3 years from the date that consent has been obtained
Existing Client	Indefinitely
Previous Client (no current product or service in place)	Indefinitely
Claim files	Indefinitely
Emails	6 years
Complaints	3 years from the date that the complaint was received
Call Recordings	Indefinitely

Information Retention and Deletion Schedule – Contracts, Sales and Marketing – TCIFA

Information description	Retention period – Thomas Carroll
Prospective Clients	3 years from the date that consent has been obtained
Existing Client	Indefinitely
Previous Client (no current product or service in place)	Indefinitely
Claim files	N/A
Emails	6 years
Complaints	Indefinitely
Call Recordings	Indefinitely