

# Data Retention and Disposal Schedule

## Solace SEND Support Ltd

Last reviewed: October 2026

### Purpose

This schedule sets out Solace's approach to retaining and securely disposing of personal information. Retention periods should be reviewed as the business develops and where legal, regulatory or contractual requirements change.

| Information                              | Retention approach                                                                                                |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| Client enquiry information               | Until the enquiry is resolved. Delete if no client relationship develops and there is no reason to retain it.     |
| Consultation records                     | For the duration of the client relationship and for an appropriate record-keeping period afterwards.              |
| EHCPs, reports and case documents        | For the duration of the case and for an appropriate record-keeping period afterwards.                             |
| Case-related emails                      | For the duration of the case and for an appropriate record-keeping period afterwards.                             |
| Invoices and payment records             | In accordance with applicable tax and accounting requirements.                                                    |
| Case tracker information                 | While the case is active and for an appropriate record-keeping period afterwards.                                 |
| Authority to Act                         | While the authority is relevant and for an appropriate record-keeping period afterwards.                          |
| Marketing information                    | No mailing list or marketing database is currently maintained.                                                    |
| SEND Allies associate client information | In accordance with the SEND Allies contract, documented instructions and applicable data protection requirements. |

### Deletion and disposal

When information is no longer required, Solace will securely delete electronic records and securely dispose of paper records. Where a client requests deletion, Solace will consider the request in accordance with applicable data protection law and will retain information only where there is a lawful or legitimate reason to do so.

### Review

Retention arrangements will be reviewed at least annually and when there are changes to services, legal requirements or the way information is stored.