

Quick Reference: Retention Calculations

Retention Period is listed only in years

Calendar Year 2023

Retention Period	Dispose of Documents Through This Date
1 year	End of the last month, 2021
2 years	End of the last month, 2020
3 years	End of the last month, 2019
4 years	End of the last month, 2018
5 years	End of the last month, 2017
6 years	End of the last month, 2016
7 years	End of the last month, 2015
10 years	End of the last month, 2011
20 years	End of the last month, 2001

For example, if today's date is July 22, retain all of July but prepare to dispose of records dated through June 30 of the year that appears on the chart.

Retention Period begins at the conclusion of the fiscal year

Fiscal Year 2023

Calculations valid September 1, 2022 – August 31, 2023

Retention Period	Dispose of Documents Through This Date
FE+1	August 31, 2020
FE+2	August 31, 2019
FE+3	August 31, 2018
FE+4	August 31, 2017
FE+5	August 31, 2016
FE+6	August 31, 2015
FE+7	August 31, 2014
FE+8	August 31, 2015

Retention Period begins at the end of the calendar year

Retention Period	Dispose of Documents Through This Date
CE+1	December 31, 2020
CE+2	December 31, 2019
CE+3	December 31, 2018
CE+4	December 31, 2017
CE+5	December 31, 2016
CE+6	December 31, 2015
CE+7	December 31, 2014