



Record Retention: What to Keep and Why!

(90-minute webinar – available live or on-demand)

Thursday, August 12, 2021

12:00 PM Pacific

1:00 PM Mountain

2:00 PM Central

3:00 PM Eastern

[Register Here](#)

Record retention compliance is crucial. In developing an effective records retention and destruction policy, financial institutions must identify which records must be retained; determine how to store, retrieve, and destroy records; and when and how to implement a litigation hold.

AFTER THIS WEBINAR YOU'LL BE ABLE TO:

- Know why a record retention and destruction program is essential
- Develop general elements of a good program
- Understand legal and statutory requirements
- Manage third-party risk
- Deal with discovery issues and litigation holds

WEBINAR DETAILS

Learn how to devise and implement an effective records retention and destruction program, combining people, processes, and appropriate technology to meet compliance requirements, corporate goals, and litigation hold requirements. While retaining records is essential to meet regulatory, business, and other legal requirements, destroying records is equally important – and that includes electronic records, too.

WHO SHOULD ATTEND?

This informative session is designed for senior officers, CFOs, controllers, operations officers, compliance officers, IT officers, records management staff, risk managers, attorneys, and auditors.

TAKE-AWAY TOOLKIT

- Record retention checklist
- Sample record retention policy
- Checklist for developing a litigation hold
- Employee training log
- Interactive quiz

MEET THE PRESENTER

Phillip Buffington, Adams and Reese, LLP

Phil Buffington is a partner with Adams and Reese LLP. For over 30 years he has served as a trusted advisor to community, regional, and national financial institutions on a wide range of topics, including regulatory issues, mergers and acquisitions, lending, bankruptcy, litigation, arbitration, and more. Now he focuses on counseling and transactions, including regulatory issues, M&As, securities, and commercial lending. In addition, he brings the experience of a seasoned litigator.

THREE REGISTRATION OPTIONS – WHAT YOU GET

1. Live Webinar Includes

- Unlimited connections within your institution to the Live Webinar
- Handout and Take-Away Toolkit
- Available on desktop, mobile & tablet
- Presenter's contact info for follow-up

2. On-Demand Webinar Includes

- Recording of the Live Webinar
- Available two business days following Live date
- Handout and Take-Away Toolkit
- Available on desktop, mobile & tablet
- Free Digital Download, yours to keep
- Share link with anyone at your institution
- Presenter's contact info for follow-up

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