



KGR BOOKKEEPING SERVICES

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Document Management & Retention Policy

As a cloud-first organization, KGR Bookkeeping Services does not include nor is responsible for document management related services within our standard service offerings; including but not limited to delivery, printing, archiving, and storage services. ONLY under circumstances as per client's electronically written special requests consent, KGR Bookkeeping Services may provide certain document management service by utilizing third-party service providers at an additional processing & handling surcharge as per an agreed upon service rate to be paid by client prior to arranging such services. KGR Bookkeeping Service is NOT responsible for services provided by third-party service providers.

Clients' document and information (electronic & hard copy) that has been obtained during the course of service engagement will have a retention period until calendar year end from service invoice date; it is client's responsibility to make arrangements to obtain documents from KGR Bookkeeping Services within the retention period. Past the retention period, any documents which must be retained for legal, governmental, or professional body regulations, will be archived for its required timeframe, at which then will be disposed of by either professional shredding services or deletion from cloud-based or electronic storage.

KGR Bookkeeping Services is not responsible for management and security of contents uploaded and stored using Third-Party Document Management and/or Sharing Application(s). KGR Bookkeeping Services acts solely as an intermediary in providing client(s) access to Third-Party Document Management and/or Sharing Application(s). Unless otherwise stated in a written agreement with KGR Bookkeeping Services, for tax service clients, any documents within Third-Party Document Management and/or Sharing Application(s) will be permanently deleted within 30 days of client(s) return(s) being electronically filed. Unless otherwise stated in a written agreement with KGR Bookkeeping Services, for bookkeeping clients, any documents within Third-Party Document Management and/or Sharing Application(s) will be permanently deleted within 60 days of the date of completion of client(s) year-end bookkeeping. It is the responsibility of the client(s) to download and retain any documents shared within Third-Party Document Management and/or Sharing Application(s) before they are deleted and permanently removed from any cloud-based storage.