

Gain valuable information for successfully organizing, storing, archiving, and destroying your organization's critical business documents

Records Retention and Destruction

Eliminate risk and ensure compliance with the latest legal requirements

Here's just some of what we'll cover ...

- How to plan, develop, and implement a records retention program from the ground up
- The Records Retention Audit: an easy way to assess the entire content of your files
- Guidelines that help you identify the types of records, forms, and documents you should maintain access to, archive, or destroy
- Why keeping records for too long can be as harmful as destroying them too soon
- Records management software: what works, what doesn't, and what's best for your organization
- Security methods for storing and accessing sensitive documents and information
- What you should know about legal compliance with HIPAA, SEC, ISO, AICPA, FERC, and the FTC
- How to deal with e-mail, Internet materials, and other electronic documents
- 3 ways to ensure full employee cooperation and compliance – at every level of your organization

And much, much more — see pages 4 – 5 for details



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Learn how to build an effective records management, retention, and destruction program in just one day of focused, information-packed training ...

Now, more than ever, it is absolutely critical that you maintain accurate records, be able to access them immediately, and store and dispose of them properly. Many organizations (perhaps yours?) lack a systematic, across-the-board process or policy for records retention, instead relying on a haphazard approach that can place them in legal jeopardy.

Do you know which documents, files, and records must be retained ... how they should be filed and stored ... when and how they should be destroyed ... and how to make sure your procedures are in compliance with government regulations?

Have you established consistent policies and procedures that are laid out clearly to everyone involved with records retention? Do you know how to respond to a request for litigation discovery, what to do if your organization undergoes a government investigation, and how to handle various crises and disasters that might affect your critical records and vital information?

Records Retention and Destruction provides the framework you need to develop a records retention program that is effective, efficient, and in compliance with regulatory and legislative practices. You will learn how to ensure that employees implement the policies and procedures you initiate ... gain tools and tips for keeping your program current ... discover the methods best suited to your organizational needs for storage, retrieval, and destruction ... and get a “crash course” in the latest legal developments pertaining to records. This seminar is jam-packed with practical, real-world solutions you can put to work as soon as you return to the office. Fascinating case studies, examples, and “best practices” offer an exciting window into the most effective records retention programs in today’s organizations, from large corporations to small businesses, to reveal what works – and what doesn’t.

This seminar features leading-edge insight into the latest court rulings, regulatory requirements, and legal developments. Don’t miss your chance to get up to date on trends, legislation, and laws relating to records management and retention.

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Could your records retention program use an overhaul?

Is your records retention program outdated or difficult to access and maintain?

Are your file cabinets bloated and desktops stacked with documents and files no one is quite sure what to do with?

What about all those boxes of floppy disks tucked away in storage rooms? Are you sure there's nothing important – or dangerous – lurking on old hard drives?

Can you confidently say the records in your organization are in complete compliance with the newest legislation and regulatory requirements?

Attend this one-day course and find out how to assess and troubleshoot your current system. You'll learn how to review it with a critical eye and develop a solid, workable records retention program that serves your organization and employees effectively.

Discover step-by-step setup procedures, essential information on streamlining storage and access processes, proper destruction and disposal methods, legal and regulatory requirements for compliance – and much, much more!

We'll help you pinpoint the hot spots in your system and design a comprehensive, practical, and cost-effective solution that takes your records retention program to the highest level of efficiency and usefulness and reduces your organization's risk of exposure.

High-profile cases have pushed records management into the spotlight ...

Enron, Arthur Andersen, Bridgestone Firestone ... these well-known cases illustrate serious consequences pertaining to records management. In the courtroom, records can help prove innocence – or serve to pinpoint guilt. New laws such as HIPAA and the Sarbanes-Oxley Act have added criminal jail time to previous penalties, and recent

You will learn how to:

- Document oral and electronic communications properly
- Protect records and vital information during emergency conditions
- Establish retention schedules and status timetables for archiving and destroying records
- Protect all sensitive, confidential materials when storing, accessing, and transferring them
- Develop an organization-wide policy regarding corporate e-mail and instant messages
- Deal effectively with older media including microfiche and microfilm
- Choose from a variety of secure, cost-effective storage solutions
- Understand the “alphabet soup” of resources, regulations, rules, and statutes as they apply to your industry or organization: HIPAA, SEC, ISO, AICPA, FERC, and FTC

court cases have gone against organizations, requiring them to pay millions of dollars in fines. Don't inadvertently put your organization at risk – make sure that your records retention program is in complete compliance with the very latest rules and regulations.

Course Content

Records retention basics: How to create an effective program for your organization

- The importance of being able to identify the different types of records, documents, and forms critical to your organization
- Compliance from within — how to make sure employees follow records retention guidelines (Hint: Threats don't work!)
- How to train employees, vendors, and others on the specifics of your system
- The best, most effective ways to inventory documents and records
- Records management software – whether to invest in it, and which programs would work best for your company
- How to deal with physical and digital space constraints
- The “life cycle” of a record, and how to determine whether a document should be archived, placed in “easy access,” or destroyed
- Destruction methods: the most cost-effective, efficient, and secure choice for your organization
- What to do with older media such as microfiche, microfilm, floppy disks, CDs, Zip files, and more
- Why keeping too much can be just as harmful as keeping too little

Laws, rules, and regulations: How to stay in compliance with the latest requirements

- The ramifications of the newest HIPAA legislation and the Sarbanes-Oxley Act
- Government and industry Web sites and resources to help you stay current and compliant
- Legal issues that can affect your document destruction process — what you need to know *now*
- Information security considerations for storage and access procedures
- Guidelines for retaining various documents for government purposes – what to save, and for how long
- Rules of thumb for retaining personnel records, accident reports, government agency citations, and more
- How to protect and secure your organization's assets: trademarks, patents, copyrights, formulas, databases, and more

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Security issues: How to protect your organization and its employees

- Copy control: the best strategies for managing authorized and unauthorized duplication of documents
- How to protect all sensitive, confidential materials when storing, accessing, and transferring them
- Security methods for storing and accessing sensitive documents and information
- Retention schedules and status timetables for archiving and destroying records
- Your records retention disaster plan: how to protect sensitive data and mission critical records in case of an emergency
- Records that should be retained off-site

E-mail, IM, Web content, and more: How to establish policy on electronic records

- The unique problems created by e-mail messages and other paperless records
- How to store and manage electronic data through the latest records management software
- Guidelines for the length of time to keep e-mail, instant messages, and cell phone records
- How to determine the critical levels of importance for various types of electronic records
- The truth about “personal” e-mails and phone conversations: how to access, store, and destroy these sensitive materials
- Legal issues surrounding personal electronic messages – what you need to know now as a records retention expert
- Which electronic records are critically important to back up, and how often
- What could happen if employees take backup data home: little-known issues that will help you establish policy
- Rules of thumb on protecting the databases and information repositories that drive the financial success of your organization
- When it's time to remind employees what's proprietary, confidential, and not for public consumption

8 reasons not to miss this course!

- 1 Gain an in-depth understanding of all the legal issues affecting records retention and destruction
- 2 Develop company-wide policies and procedures that are simple for everyone to follow
- 3 Know for sure – with no second-guessing – what documents can be safely destroyed, what must be archived, and what must be stored for rapid retrieval
- 4 Come away from the training with practical working knowledge and insight regarding the very latest changes, trends, and new legislation affecting records retention
- 5 Ensure that your electronic and paper documents will be better organized for easier, swifter access
- 6 Be well-prepared to handle audits, government investigations, or other legal issues that come up
- 7 Enjoy the peace of mind that comes with knowing your backup/disaster plan is firmly in place and your most critical documents and assets are protected
- 8 Save time and effort retrieving, archiving, and destroying documents with our streamlined processes and procedures

Who should attend?

This seminar is designed for anyone directly responsible for developing and/or maintaining an effective records retention, access, and destruction program for their organizations.

- Controllers ■ Accountants ■ Medical Records Professionals ■ Legal Professionals
- Administrators ■ IT Staff ■ Financial Professionals ■ HR Managers/Staff
- Small Business Owners ■ Bookkeepers ■ CEOs and COOs

Guaranteed Results!

All of our seminars are 100% SATISFACTION GUARANTEED! We're confident that this seminar will provide you with the training to help you develop a records retention program that is effective, efficient, and in compliance. If for any reason you are dissatisfied, send us a letter (Attn: Customer Relations) within 30 days of your seminar attendance stating the reason you were not satisfied, and we'll arrange for you to attend another one of our seminars or receive a full refund — *hassle-free*.

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Express Seminar Enrollment! Please be sure to provide us with your e-mail address or fax number and check the Express Seminar Enrollment box on the registration form. You will receive your e-mailed or faxed confirmation within 48 hours of our receiving your e-mailed, faxed, or mailed registration form.

Program Schedule

Check-in: 8:30 a.m. – 9:00 a.m.
Program: 9:00 a.m. – 4:00 p.m.

Cancellations and Substitutions

You may cancel your registration up to 10 business days before the program and we will refund your tuition less a cancellation fee. If you need to cancel less than 10 business days prior to the program, you may 1) send a substitute from your organization or 2) transfer your registration fee to another program of your choice that is scheduled within 12 months of your original event. Please note that if you don't cancel and don't attend, you are still responsible for payment. Substitutions may be made at any time.

Please Note

- We will e-mail, fax, or mail your confirmation to you once your registration is completed.
- You will be notified by e-mail, fax, and/or mail if any changes are made to your scheduled program (i.e., date, venue, city, or cancellation).
- Walk-in registrations will be accepted as space allows.
- Please, no audio or video recording. See your program leader for audio and video program availability.
- Lunch and parking expenses are not included.
- If using a purchase order, please attach it to a completed registration form and mail to us right away.
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If the purpose of attending a Fred Pryor seminar is to help you maintain or improve skills relating to employment or business, expenses relating to the program may be tax-deductible according to I.R.C. Reg. 1.162-5. Please consult your tax adviser.

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Records Retention and Destruction

Eliminate risk and ensure compliance with the latest legal requirements

Get solid answers to tough questions like these:

- What types of documents and records should be kept, and what should be destroyed?
- How long must documents be archived to avoid legal retribution?
- What are the best ways to store large amounts of data and sensitive information?
- How should a backup/recovery plan be put into effect in case of disaster?
- What are the newest government rules and regulations regarding records retention?

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