

WASHINGTON STATE BAR ASSOCIATION

Table of Dates for File Retention

RPC 1.15B requires that trust account records and related documents be retained for seven (7) years. The following table suggests periods for retaining the client files that pertain to certain practice areas. The table is a suggested standard. Lawyers are free to choose a longer or shorter term of retention of client files. Maintain a permanent record that describes the file and the disposition of the file. Include in the permanent record any releases and receipts for files that are no longer under your control.

Special considerations, such as long-term client relationships, may require longer retention of client files. For example, those files may contain information that is useful for other matters for that client such as in immigration matters and land use matters, among others.

PRACTICE SPECIALTY	GUIDELINES
Probate Claims & Estates	Excluding tax, 10 years after final judgment; tax basis information – permanently
Tort Claims (Plaintiff)	7 years after final judgment or dismissal, except when minor involved; then when minor attains majority plus three years
Tort Claims (Defense)	7 years after final judgment or dismissal.
Contract Action	7 years after satisfaction of judgment, dismissal, or settlement.
Bankruptcy Claims & Filings	7 years after discharge of debtor, payment of claim, or discharge of trustee or receiver
Dissolution	7 years after entry of final judgment or dismissal of action, or date at which settlement agreement is no longer effective, except when minor children are involved and then at the young attaining majority plus three years
Real Estate Transactions	Subject to guidelines and tax needs; otherwise 7 years after settlement date, judgment, termination of sale, foreclosure, or other completion of matter; Retain surveys and legal descriptions not of record
Leases	7 years after termination of lease
Original Wills	Return to client after signing and conclusion of matter or file with local court of proper jurisdiction
Criminal Cases	7 years after date of acquittal or length of incarceration

Questions

Ethics Line: [1-800-945-9722](tel:1-800-945-9722) or <https://www.wsba.org/for-legal-professionals/ethics/ethics-line>

Practice Management Assistance Program:

- Schedule a phone consultation: www.wsba.org/consult
- Send an email inquiry: pma@wsba.org