

<b>Records Series Name</b>	<b>Description</b>	<b>Retention Period</b>	<b>Reason for Retention Period / Legal Citation</b>	<b>Official Record Format (paper, electronic, etc.)</b>
<b>Deal Analysis</b>	Records documenting the analysis, assessment of risk, and evaluation of the investment rate of return (IRR) for potential business deals, agreements, etc. May include industry analysis, research materials, financial models, strategic plans, correspondence, presentations, and summary financial analysis.	5 years after approval or rejection of deal	Business Decision	Electronic on Shared Drive.
<b>Deal Meeting Proposals</b>	Documentation presented to executive management requesting approval for new business deals, agreements, etc. Includes meeting agenda, deal sheets and backup (analysis), notes documenting findings, approvals, etc., and memoranda sent to affiliate with terms approved.	Current year + 10 years	Business Decision	Electronic on Shared Drive.
<b>Mergers &amp; Acquisitions – Due Diligence</b>	Records documenting the analysis, assessment of risk, and evaluation of the investment rate of return (IRR) for the potential purchase of a company or business, including due diligence required by the law. May include information on engaging banks for necessary funding	Final Purchase + 6 years	Business Decision	Electronic on Shared Drive.