

**University of Wisconsin System Legal Affairs Records Schedules**

Record Series #	Record Series Title	Record Series Description	Retention Event	Retention Period	Disposition	PII	Confidential	Sunset Date	Superseded
W0000259	Legal Matter Case Files	<p>The University of Wisconsin legal affairs offices serve as primary, advisory, or liaison counsel on a variety of litigated case files including, but not limited to, State of Wisconsin administrative proceedings, Federal or State court proceedings, internal proceedings, federal enforcement actions and other campus legal matters.</p> <p>Legal matter case files include, but are not limited to, pleadings and legal arguments, client files, evidence, research, legal summons and subpoenas issued, expenses, attorney notes, medical records, and depositions or transcripts. Records may also include correspondence, attorney notes or additional documentation associated with the cases.</p> <p>These records may be covered by lawyer-client privilege according to Wis. Stat. § 905.03 and the work-product doctrine codified in Wis. Stat. § 804.01(2)(c)1.</p>	Date Case Closed	EVT + 10 years	Destroy Confidential	Yes	Yes	August 2032	UWLA0001 - Matter Case Files
W0000260	Legal Matter Case Files - Historically Significant	<p>The University of Wisconsin legal affairs offices serve as primary, advisory, or liaison counsel on a variety of litigated case files including, but not limited to, State of Wisconsin administrative proceedings, Federal or State court proceedings, internal proceedings, federal enforcement actions and other campus legal matters.</p> <p>This series documents historically significant legal cases at the University of Wisconsin that have long-lasting impact.</p> <p>Legal matter case files include, but are not limited to, pleadings and legal arguments, client files, evidence, research, legal summons and subpoenas issued, expenses, attorney notes, medical records, and depositions or transcripts. Records may also include correspondence, attorney notes or additional documentation associated with the cases.</p> <p>These records may be covered by lawyer-client privilege according to Wis. Stat. § 905.03 and the work-product doctrine codified in Wis. Stat. § 804.01(2)(c)1.</p>	Date Case Closed	EVT + 20 years	Transfer to UW Archives	Yes	Yes	August 2032	UWLA0002 - Legal Affairs Case Files - Historically Significant
W0000261	Trademark and Intellectual Property Case Files	<p>This series contains University of Wisconsin legal affairs case files associated with university-related trademarks, copyright and other intellectual property issues .</p> <p>Records may include, but are not limited to, legal analysis, responses and recommendations, certificates of registration received on behalf of the University, correspondence and associated documents.</p> <p>These records may be covered by lawyer-client privilege according to Wis. Stat. § 905.03, the work-product doctrine codified in Wis. Stat. § 804.01(2)(c)1, and proprietary information that would be covered pursuant to Wis. Stat. § 19.36(5).</p>	Date Case File is Closed	EVT + 10 years	Transfer to UW Archives	Yes	Yes	August 2032	UWLA0003 - Legal Trademark and Intellectual Property – Formal Legal Documents
W0000262	Trusts, Real Estate and Construction Records	<p>This series contains University of Wisconsin legal affairs records associated with university-related trusts, real estate and construction projects.</p> <p>Records may include, but are not limited to, real estate/construction project and trust fund creation legal advice, correspondence and associated documents. The formal final documents (deeds, gift instruments, etc.) are retained by the appropriate system office.</p> <p>These records may be covered by lawyer-client privilege according to Wis. Stat. § 905.03 and the work-product doctrine codified in Wis. Stat. § 804.01(2)(c)1.</p>	Date Real Estate/Construction Project is Completed or Date Trust Fund is Established	EVT + 10 years	Destroy Confidential	Yes	Yes	August 2032	
W0000263	Legal Client Consultation Records	<p>The University of Wisconsin general counsel and legal affairs offices frequently consult with university clients on legal questions and concerns.</p> <p>Consultation records include, but are not limited to, client records, legal analysis, responses and recommendations, correspondence and associated documents.</p> <p>Records are held with regard to applicable statutes of limitations for potential related claims to be filed.</p> <p>These records may be covered by lawyer-client privilege according to Wis. Stat. § 905.03 and the work-product doctrine codified in Wis. Stat. § 804.01(2)(c)1.</p>	Date of Resolution	EVT + 6 years	Destroy Confidential	Yes	Yes	August 2032	UWLA0004 - Client Consultation Records