



Rick Surber

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Biography: Rick Surber, CRM, IGP has worked in records and information management since 2009. As a Senior Analyst and Licensed Attorney in the Consulting Division at Zasio, he specializes in the development of records retention schedules for clients, including their compliance with legal requirements. Rick is also responsible for managing the legal research supporting Zasio's Versatile

Retention software product. Rick is currently the President of the Boise ARMA Chapter. He received his undergraduate degree from Boise State University and earned his Juris Doctor's degree from the University of Idaho College of Law.

Topic Summary: RIM Professionals often struggle with determining how long records should be retained for legal purposes. In-house counsel, staff attorneys, and law departments are usually too busy keeping up with litigation and regulatory projects to help with RIM research, leaving these efforts to the RIM Team. This session explores what factors go into determining legal records retention requirements, such as state/federal laws/statutes/guidelines, statutes of limitations, and other legal factors.