

## Privacy Statement

This statement explains how we may collect and process information about visitors to our site, prospective clients, existing clients and others relevant to the legal advice and services enquired about by a prospective client or that we are providing to an existing client.

### **Collection of data**

Information we may collect from any of these which is defined as 'personal data' can include:

- Personal details including full name, previous names, marital status, date of birth, address, National Insurance number, telephone number (landline and/or mobile), e-mail address, employment status
- Evidence of identity – eg. driving licence, passport, bank statement, utility bill and/or Identity Card
- Credit history and records (obtained from credit reference and fraud prevention agencies) relating to the person we are dealing with, their partner and anyone else with whom there is a financial link
- Family, lifestyle and social circumstances and your personal and/or business relationships with others
- Business interests and activities
- Financial details including income, savings and investments, property interests, debts, bank and credit card details
- Transaction data – eg. details of payments to and from you in relation to services we supply to you or others
- Employment/self-employment details and activities

We may also collect information defined by legislation as 'special category data', which can include

- Details of physical and/or mental health issues
- Racial or ethnic origin
- Religious, political and other beliefs

- Criminal convictions
- Sexual orientation

Special category data will generally only be processed by us if it has been voluntarily provided by the person concerned or if it is relevant to the legal service being enquired about or with which we are instructed to assist. For example, your health would be relevant to the advice we might give in relation to making a Will or Power of Attorney. Explicit consent would be required for processing special category data.

We also collect technical data from visitors to our site, such as internet protocol, address, browser type and version, time zone setting and location, browser plug in types and versions, operating system and platform and other technology on devices used to access our site.

We may collect information about visits to our site, including full Uniform Resource Locators, clickstream to, through and from our site (including date and time), pages viewed, page response times, download errors, length of visits to certain pages, page interaction information and methods used to browse away from the page.

Information may be collected direct from an individual or from third parties relevant to a person's enquiry or instructions, from credit reference and fraud protection agencies – and from publicly available sources including Companies House, H M Land Registry, The Probate Registry and The Registrar of Births, Marriages and Deaths.

We may also collect technical data using automated technologies or interactions or receive it from institutions like Google.

### **Use of data**

We shall use personal information in respect of matters in respect of which we are being asked to provide quotes and information to enable a person to decide whether they wish to instruct us - and in relation to matters in which we are instructed where it is relevant to our contractual obligation to provide legal services to that person, to maintain a proper relationship with that person (which may, if that person has so elected, include providing them with details of other services which may be relevant to them) - and to comply with legal obligations for the prevention of financial crime and money-laundering. We may also use it to administer accounts, service your relationship with other organisations where relevant, where required by law to prevent financial crime and, on occasion, for market research and (only with specific permission) marketing.

### **Sharing of data**

As regards our sharing of a person's data with a third party there is a strict code of conduct for the profession. We may need to liaise with medical experts, barristers, private investigators, healthcare professionals and social and welfare organisations, courts and tribunals, HMRC, search agencies, credit reference agencies, insurers, property agents, brokers, lenders and solicitors representing other parties with whom we are dealing on our client's behalf. We may, on occasion need to deal with members of a client's family or a friend of theirs. In such instances we will obtain specific authority before doing so. We are also required to share certain information with our own auditors, indemnity insurers and regulatory professional bodies to ensure that we remain compliant with all professional and legal requirements and maintain the highest standard of service and accountability.

### **Retention of data**

We will only retain personal data for as long as is necessary to fulfil the purpose for which it was collected, including satisfying legal, accounting or reporting requirements.

Our current retention periods are, with two exceptions, seven years from the date of the end of our business relationship with the person concerned or from the conclusion of the matter with which we have dealt for them, whichever is the later. In the case of information relating to the preparation of Wills the period is twelve years from the date of the death of the client for whom the document was prepared and in the case of Powers of Attorney seven years from that person's death.

### **Security**

We have robust information security management systems in place. However, the transmission of information via the internet can never be wholly secure and electronic communications between us must be at your risk.

### **Your rights**

The General Data Protection Regulation confers a number of rights on you. These include the right to see – or have sent to a third party - a copy of the information we hold about you unless we have lawful grounds to refuse this.

If we receive a request from a person about their personal data we shall take appropriate steps to identify them as the person to whom the data relates, in order to avoid it falling into the wrong hands.

We shall not charge for supplying these details except where a request is unfounded, mischievous or excessive.

If you believe any personal data held by us about you is incorrect you may request that it be corrected or erased.

In some situations you have the right to object to or limit our processing of information about you, but this will not apply where we have other legal justification for continuing to process the data or an overriding legitimate interest in doing so.

In order to exercise these rights, you should contact us using one of the means listed on our website.

If you have reason to complain about our processing of personal data you should raise your concerns in the first instance with Helen Starkie. If she is unable to address your concerns to your satisfaction then you have the right to complain to the Information Commissioner's Office ([www.ico.org.uk](http://www.ico.org.uk)).