

Data Protection - Privacy Policy – Updated December 2021

This document provides information as to what information is collected from customers, how it is stored, used, protected and then disposed of when no longer required.

1: Data collection

Only data that is required to complete work in relation to my responsibilities is collected. This includes:

- Legal Name
- Postal Address
- Email address
- Telephone numbers – Landline/mobile

If instructed, further information maybe required, such as:

- Date of Birth
- Bank Payment information
- SBI number
- VAT number
- Copies of passport to fulfil Anti-Money Laundering requirements

Information may also be gathered from other sources:

- Land Registry
- Referral Agents
- Electoral Register
- Social Media Platform

Data is collected to allow contact with you, accounting purposes, fulfil services to you and legal obligations on your behalf or that of the company.

2: Data Stored

Customer data is held on encrypted, password secured local devices and UK based cloud storage.

- Working data is held locally on encrypted drives
- Data is synchronised using UK based encrypted cloud systems
- Data is backed up using UK based encrypted cloud systems
- Data being held on customers behalf is kept in secure storage when not in use.

3: Data Protection

Protection of data is taken very seriously. All information held about customers is held within password protected and encrypted systems and backed up.

- Customer information is only held when absolutely necessary, primarily to allow an expedient service..
- Customer data is kept to a minimum and only held as long as necessary/as long as relationship exists or as required to comply with legal/accounting requirements.

4: Secure Disposal

Data is removed from systems when no longer needed.

- Backups are held for 30 days after deletion after which data is then irretrievable.
- End of contract, all information that is not required for legal obligations will be removed 30 days after cessation.

5: Right of Access, Rectification and Erasure

Data Protection Legislation gives you the right to see data held about you, correct anything which is incorrect or incomplete and the right to have your data removed where no legal obligation requires it to be held.