

Privacy Notice

Gumersalls, The White House, 16 Waterloo Road, Epsom, Surrey, KT19 8AZ

Tel: 01372 721122

Email: solicitors@gumersalls.co.uk

Website: www.gumersalls.co.uk

We are committed to protecting and respecting your privacy and the data/information you provide us with.

We may collect and process the following data about you:

- If you instruct us, information you provide us with at that time. This may include your name, address, date of birth, identification evidence etc.
- If you contact us with a query, we may keep a record of the information you provide us with at that time.
- If you complete one of our feedback questionnaires at the end of a matter (non compulsory), we may use the information you have put on there for research purposes.

We have an up to date Data Protection Policy and a copy of this is available on request. Our Information Compliance Officer, who is responsible for overseeing the policy and developing related policies and guidelines is Tom Edwards. The Deputy for this role is Laura Pawley. Our policy and this Notice have been produced in accordance with the requirements under the EU General Data Protection Regulation (Regulation (EU) 2016/679), known as the ‘GDPR’.

We have notified the Information Commissioner’s Office of our data processing activities under registration number: Z6926230.

The Legal Basis for Processing your data

This is necessary for us to undertake the work you have requested us to do on your behalf and for us to meet our legal compliance obligations. We will also ask you for your express consent for us to process your data (see below) for these purposes.

Your Identification Documents

These are required in order for us to complete our anti money laundering checks as part of the regulations we have to adhere to. In addition to checking the documents we request from you, the data provided in these documents will be used to conduct an electronic search to verify your identity using our third party provider, Smartsearch. Again, this search is only made for the purpose of complying with all required regulations and will have no impact on your credit score.

Where your data will be stored

All information you provide to us will be stored securely in files and on secure servers. Once we have received your information, strict procedures and security features will be used to try to prevent unauthorised access.

How long we will store your data for

We are entitled to keep all of your papers and documents whilst there is money owing to us. We will keep your data and our file of papers (except for any of your papers which you ask to be returned to you) for no longer than is necessary (usually for not less than 5 years and no more than 12 years), in accordance with our policies and the regulations we have to adhere to.

In the case of Will files, these are held for the lifetime of the donor of the Will and beyond as they are required for the administration of estates. We will not destroy any documents you ask us to deposit in safe custody (ie. your original Will or property documents).

Your Rights

Here is a summary of your rights regarding your data. Please contact us if you require any further information regarding any of them.

- Access – you have a right to access information we hold about you.
- Correction – you can correct us if we hold any inaccurate data about you.
- Erasure – you have a right ‘to be forgotten’ where your personal data is no longer necessary for the purposes for which it was collected. This does not apply where there is a lawful reason for continued processing of your data, or where we need to retain your data to meet our legal obligations, such as the Anti Money Laundering Regulations.
- Restriction of processing – there are certain circumstances where you can restrict the processing of your data. For example, if you contest the accuracy of your data processing can be restricted for a period enabling us to check if it is accurate.
- Object to processing – there are certain circumstances where you can object to us processing your data, for example if it causes unwarranted and substantial damage or distress. Any objection must be made in writing to us.

- Data portability – you may be able to request your information from us and then re-use it with other service providers.
- Withdrawing consent – If you consent to us processing your data by signing this form below, you have the right to withdraw the consent at any time. This must be in the form of a signed and dated letter from you or an email from an email address you have already provided to us.

.....

I/We confirm that I/We have read and understood the above Privacy Notice and hereby give my/our consent to Gumersalls of The White House, 16 Waterloo Road, Epsom, Surrey, KT19 8AZ to hold and process my/our personal data based on the same.

Signed:

Full Name:

Date:

.....

For Office Use Only: Ref -