

PRIVACY NOTICE

Who We Are

Batchelors Solicitors gather and process your personal information in accordance with this privacy notice and in compliance with the relevant data protection regulation and laws. This notice provides you with the necessary information regarding your rights and our obligations, and explains how, why and when we process your personal data.

Batchelors Solicitors *main* office is at Charles House, 35, Widmore Road Bromley BR1 1RW and we are a Partnership. We are registered on the Information Commissioner's Office Register; registration number Z5722330 and act as the data controller and data processor when processing your data. Our Data Controller is Bernard Stotesbury who can be contacted at the above address or by phone on 0208 768 7000 or by e mail to batchelors@batchelors.co.uk

Information That We Collect

Batchelors Solicitors processes your personal information to meet our legal, statutory and contractual obligations and to provide you with our products and services. We will never collect any unnecessary personal data from you and do not process your information in any way, other than as specified in this notice.

The personal data that we collect from you includes: -

- Name
- Date of Birth
- Home Address
- Personal Email
- Business Email
- Home Telephone Number
- Mobile Telephone Number
- National Insurance Number
- Passport Number
- Driver's License Number
- Bank Account details
- Special Category Data (occasionally *health/medical information dependent upon the nature of the case instructed on*)

We collect information in the below ways: -

Paper consent forms and online forms

Consequences of Not Providing Your Data

You are not obligated to provide your personal information to Batchelors Solicitors, however as this information is required for us to provide you with our services we will not be able to offer our services without it.

How We Use Your Personal Data

Batchelors Solicitors takes your privacy very seriously and will never disclose, share or sell your data without your consent; unless required to do so by law. We only retain your data for as long as is necessary and for the purpose(s) specified in this notice. Where you have consented to us providing you with promotional offers and marketing, you are free to withdraw this consent at any time.

The purposes and reasons for processing your personal data are detailed below: -

- We collect your personal data in the performance of a contract or to provide a service
- We collect and store your personal data as part of our legal obligation for Money Laundering identification purposes
- We will occasionally send you marketing information where we have assessed that it is beneficial to you as a client and in our interests. Such information will be non-intrusive and is processed on the grounds of legitimate interests

Your Rights

You have the right to access any personal information that Batchelors Solicitors processes about you and to request information about: -

- What personal data we hold about you
- The purposes of the processing
- The categories of personal data concerned
- The recipients to whom the personal data has/will be disclosed
- How long we intend to store your personal data for
- If we did not collect the data directly from you, information about the source

If you believe that we hold any incomplete or inaccurate data about you, you have the right to ask us to correct and/or complete the information and we will strive to do so as quickly as possible; unless there is a valid reason for not doing so, at which point you will be notified.

You also have the right to request erasure of your personal data or to restrict processing in accordance with the data protection laws; as well as to object to any direct marketing from us. Where applicable, you have the right to data portability of your information you also have the right to be informed about any automated decision-making we may use which is likely to include Automated Identification for the purposes of Money Laundering identification.

If we receive a request from you to exercise any of the above rights, we may ask you to verify your identity before acting on the request; this is to ensure that your data is protected and kept secure.

Sharing and Disclosing Your Personal Information

We do not share or disclose any of your personal information without your consent, other than for the purposes specified in this notice or where there is a legal requirement, ie compliance with Money Laundering legislation or in dealing with your instructions as part of the provision of a service. Batchelors Solicitors uses third-parties to provide services and business functions; however, all processors acting on our behalf only process your data in accordance with instructions from us and comply fully with this privacy notice, the data protection laws and any other appropriate confidentiality and security measures.

GB Group – Third Party Processor

We use GB Group to carry out Money Laundering and Identification checks and they act in the capacity of a processor on our behalf. They process identification information supplied eg a Driving Licence number in conjunction with your name, address and date of birth through the use of online databases to meet our regulatory and legal requirements. For more information about GB Group, please read their Privacy Notice at <https://www.gbgplc.com/privacy-policy/>

Please note that this may place a Money Laundering check on your credit file.

Safeguarding Measures

Batchelors Solicitors takes your privacy seriously and takes every reasonable measure and precaution to protect and secure your personal data. We work hard to protect you and your information from unauthorised access, alteration, disclosure or destruction and have several layers of security measures in place, including one of the following which will encrypt your data: -

SSL, TLS, encryptions, pseudonymisation, restricted access, IT authentication, firewalls, anti-virus/malware etc.,

Transfers Outside the EU

Batchelors Solicitors utilise MailChimp for the use of distributing Marketing Information from our database. Some of their products or services may be hosted/stored in the United States of America which means that we may transfer your e mail address outside the European Economic Area ("EEA") for the purposes below: -

Marketing Database

When you sign up to one of our newsletters the personal information you submit may be stored on servers which are hosted in the United States of America. Where this is the case, we will take steps to ensure that those providers use the necessary level of protection for your information and abide by strict agreements and measures set out by Batchelors Solicitors to protect your data and comply with the relevant data protection laws.

Where we transfer personal information for the above reasons, we utilise the below safeguarding measures and mechanisms to ensure that your personal data is always safe and secure: -

SSL, TLS, encryptions, restricted access, IT authentication, firewalls, anti-virus/malware etc.,

Legitimate Interests

As noted in the '*How We Use Your Personal Data*' section of this notice, we occasionally process your personal information under the legitimate interests' legal basis. Where this is the case, we have carried out a thorough Legitimate Interests' Assessment (LIA) to ensure that we have weighed your interests and any risk posed to you against our own interests; ensuring that they are proportionate and appropriate.

We use the legitimate interests' legal basis for processing your contact details and have identified that our interests are in keeping you informed about changes to the law that may affect legal matters eg., Wills that you have made with us.

How Long We Keep Your Data

Batchelors Solicitors only retains personal information for as long as is necessary and we have strict review and retention policies in place to meet these obligations. We are required under UK Money Laundering regulations to keep your personal identification data (name, address, contact details) for a minimum of 6 years after which time it will be destroyed. Files for Wills, Probate and Trust matters are never destroyed.

Where you have consented to us using your details for direct marketing, we will keep such data until you notify us otherwise and/or withdraw your consent.

Special Categories Data

Owing to the services that we offer, Batchelors Solicitors sometimes needs to process sensitive personal information about you (known as special category data) such as Medical Information in order for example that we might advise on issues relating to capacity to make a Will or give a Power of Attorney. Where we collect such information, we will only request and process the minimum necessary for the specified purpose and identify a compliant legal basis for so doing.

Where we rely on your consent for processing special category data, we will obtain your explicit consent through a signature. You can modify or withdraw consent at any time, which we will act on immediately, unless there is a legitimate or legal reason for not doing so.

Marketing

Occasionally, Batchelors Solicitors would like to contact you with details of services that we provide. If you consent to us using your contact details for this purpose, you have the right to modify or withdraw your consent at any time by using the opt-out/unsubscribe options on our website at www.batchelors.co.uk or by contacting Batchelors Solicitors directly.

If you **consent** to us contacting you about our services or special offers, please tick to say how you would like to be contacted: -

Post Email Telephone

Lodging A Complaint

Batchelors Solicitors only processes your personal information in compliance with this privacy notice and in accordance with the relevant data protection laws. If, however you wish to raise a complaint regarding the processing of your personal data or are unsatisfied with how we have handled your information, you have the right to lodge a complaint with the supervisory authority.

Batchelors Solicitors

Data Controller - Bernard Stotesbury

Main Office – Charles House, 35, Widmore Road, Bromley, Kent BR1 1RW

Telephone: 0208 768 7000 – E Mail: batchelors@batchelors.co.uk

Information Commissioners Office

Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF

Telephone: 0303 123 1113 – Website: www.ico.org.uk

Batchelors Solicitors Consent Form

Batchelors Solicitors take your privacy seriously and will only process your personal data with your consent and in accordance with the terms stated in our Privacy Notice. If you consent to us collecting and processing your personal data, please sign below: -

Signature: _____

Print Name: _____

Time: _____

Date: _____

I confirm that I have been provided with a copy of Batchelors Solicitors Privacy Notice prior to giving consent and that Terms and Conditions will be issued separately should I proceed to instruct them to act on my (our) behalf