

Adam Douglas Legal LLP – Privacy Policy

This notice explains when and why we collect personal information about you; how we use it, the conditions under which we may disclose it to others and how we keep it secure.

This notice does not apply to any websites that may have a link to ours.

Who we are

Data is collected, processed and stored by Adam Douglas Legal LLP; and we are what is known as the ‘data controller’ of the personal information you provide to us.

Adam Douglas Legal LLP is a limited liability partnership, authorised and regulated by the Solicitors Regulation Authority under number 596886.

Our Data Protection Officer is Claire Skene who can be contacted by email – cs@adamdouglas.co.uk

What we need

The exact information we will request from you will depend on what you have asked us to do or what we are contracted to do for you.

- There are two types of personal data (personal information) that you may provide to us
 - Personal data is the general information that you supply about yourself – such as your name, address, gender, date of birth, contact details, financial information etc.
 - Sensitive personal data is, by its nature, more sensitive information and may include your racial or ethnic origin, religion, sexual orientation, political opinions, health data, trade union membership, philosophical views, biometric and genetic data.

In the majority of cases personal data will be restricted to basic information and information needed to complete ID checks. However, some of the work we do may require us to ask for more sensitive information.

Sources of information

Information about you may be obtained from a number of sources; including:

- You may volunteer the information about yourself
- You may provide information relating to someone else – if you have the authority to do so
- Information may be passed to us by third parties in order that we can undertake your legal work on your behalf. Typically these organisations can be:
 - Banks or building societies
 - Panel providers who allocate legal work to law firms
 - Organisations that have referred work to us
 - Medical or financial institutions – who provide your personal records / information

Why we need it

The primary reason for asking you to provide us with your personal data, is to allow us to carry out your requests – which will ordinarily be to represent you and carry out your legal work.

The following are some examples, although not exhaustive, of what we may use your information for:

- Verifying your identity
- Verifying source of funds
- Communicating with you
- To establish funding of your matter or transaction
- Obtaining insurance policies on your behalf
- Processing your legal transaction including:
 - Providing you with advice; carrying out litigation on your behalf; attending hearings on your behalf; preparing documents or to complete transactions
 - Keeping financial records of your transactions and the transactions we make on your behalf
 - Seeking advice from third parties; such as legal and non-legal experts
 - Responding to any complaint or allegation of negligence against us

Who has access to it

We have a data protection regime in place to oversee the effective and secure processing of your personal data. We will not sell or rent your information to third parties. We will not share your information with third parties for marketing purposes.

Generally, we will only use your information within Adam Douglas Legal. However there may be circumstances, in carrying out your legal work, where we may need to disclose some information to third parties; for example:

- HM Land Registry to register a property
- HM Revenue & Customs; e.g. for Stamp Duty Liability
- Court or Tribunal
- Solicitors acting on the other side
- Asking an independent Barrister or Counsel for advice; or to represent you
- Non legal experts to obtain advice or assistance
- Translation Agencies
- Contracted Suppliers
- External auditors or our Regulator; e.g. Lexcel, SRA, ICO etc.
- Bank or Building Society; or other financial institutions
- Insurance Companies
- Providers of identity verification
- Any disclosure required by law or regulation; such as the prevention of financial crime and terrorism
- If there is an emergency and we think you or others are at risk

In the event any of your information is shared with the aforementioned third parties, we ensure that they comply, strictly and confidentially, with our instructions and they do not use your personal information for their own purposes unless you have explicitly consented to them doing so.

There may be some uses of personal data that may require your specific consent. If this is the case we will contact you separately to ask for your consent which you are free to withdraw at any time.

How do we protect your personal data

We recognise that your information is valuable and we take all reasonable measures to protect it whilst it is in our care.

We have exceptional standards of technology and operational security in order to protect personally identifiable data from loss, misuse, alteration or destruction. Similarly, we adopt a high threshold when it comes to confidentiality obligations and both internal and external parties have agreed to protect

confidentiality of all information; to ensure all personal data is handled and processed in line with our stringent confidentiality and data protection policies.

We use computer safeguards and we enforce, where possible, physical access controls to our buildings and files to keep data safe.

How long will we keep it for

Your personal information will be retained, usually in computer or manual files, only for as long as necessary to fulfil the purposes for which the information was collected; or as required by law; or as long as is set out in any relevant contract you may hold with us. For example:

- As long as necessary to carry out your legal work
- For a minimum of 7 years from the conclusion or closure of your legal work; in case you, or we, need to re-open your case for the purpose of defending complaints or claims against us
- For the duration of a trust
- Some information or matters may be kept for 15 years – such as commercial transactions, sales of leasehold purchases, matrimonial matters (financial orders or maintenance agreements etc.)
- Probate matters where there is a surviving spouse or civil partner may be retained until the survivor has died in order to deal with the transferable Inheritance Tax allowance
- Wills and related documents may be kept indefinitely
- Deeds related to unregistered property may be kept indefinitely as they evidence ownership

What are your rights?

Under GDPR, you are entitled to access your personal data (otherwise known as a 'right to access'). If you wish to make a request, please do so in writing addressed to our Data Protection Officer or contact the person dealing with your matter.

A request for access to your personal data means you are entitled to a copy of the data we hold on you – such as your name, address, contact details, date of birth, information regarding your health etc.- but it does not mean you are entitled to the documents that contain this data.

Under certain circumstances, in addition to the entitlement to 'access your data', you have the following rights:

- The right to be informed which is fulfilled by way of this privacy notice and our transparent explanation as to how we use your personal data
- The right to rectification - you are entitled to have personal data rectified if it is inaccurate or incomplete
- The right to erasure / 'right to be forgotten' - you have the right to request the deletion or removal of your personal data where there is no compelling reason for its continued processing. This right only applies in the following specific circumstances:
 - Where the personal data is no longer necessary in regards to the purpose for which it was originally collected
 - Where consent is relied upon as the lawful basis for holding your data and you withdraw your consent
 - Where you object to the processing and there is no overriding legitimate interest for continuing the processing
 - The personal data was unlawfully processed
 - Where you object to the processing for direct marketing purposes
- The right to object - you have the right to object to processing based on legitimate interests; and direct marketing. This right only applies in the following circumstances:

- An objection to stop processing personal data for direct marketing purposes is absolute – there are no exemptions or grounds to refuse – we must stop processing in this context
- You must have an objection on grounds relating to your particular situation
- We must stop processing your personal data unless:
 - We can demonstrate compelling legitimate grounds for the processing which override your interests, rights and freedoms; or
 - The processing is for the establishment, exercise or defence of legal claims.
- The right to restrict processing - you have the right to request the restriction or suppression of your data. When processing is restricted, we can store the data but not use it. This right only applies in the following circumstances:
 - Where you contest the accuracy of the personal data – we should restrict the processing until we have verified the accuracy of that data
 - Where you object to the processing (where it was necessary for the performance of a public interest or purpose of legitimate interests), and we are considering whether our organisation's legitimate grounds override your right
 - Where processing is unlawful and you request restriction
 - If we no longer need the personal data but you require the data to establish, exercise or defend a legal claim

Complaints about the use of personal data

If you wish to raise a complaint on how we have handled your personal data, you can contact our Data Protection Officer who will investigate further.

If you are not satisfied with our response or believe we are not processing your personal data in accordance with the law, you can complain to the Information Commissioner's Office (ICO).

Marketing data

We may contact you for the purpose of direct marketing. This means that we may use your personal data that we have collected in accordance with this privacy policy to contact you about our products or services, events etc. which we feel may interest you. The direct marketing communications may be provided to you by telephone, email or post. We will never pass on or sell your details to a third party.

How the law protects you

Data Protection law says that we are allowed to use personal information only if we have a proper reason to do so, the law says we must have one of the following reasons:-

- To fulfil a contract we have with you
- When it our legal duty
- When it is in our legitimate interest
- When you consent to it

A legitimate interest is when we have a business or commercial reason to use your information.

How we protect your personal information

We will only ever use non sensitive personal information to target individuals with marketing materials; such as name, address, telephone, email and previous instructions. Sensitive information or specific details will never be used to target marketing communications.

Any questions regarding this notice and our privacy practices should be sent by email to cs@adamdouglas.co.uk