

Globe Wareing Cropper

Incorporating Michael A Globe & Co, Wareing
Cropper Son & Co and J H Sunter Brydon & Bligh

Solicitors

PRIVACY NOTICE

We take your privacy very seriously. It is therefore important that you read this Privacy Notice carefully as it contains important information on who we are and how and why we collect, store, use and share your personal data. It also explains your rights in relation to your personal data and how to contact us or the supervisory authorities in the event that you have a complaint. When we use your personal data we are regulated under current data protection regulation. As the responsible controller, our use of your personal data is subject to your instructions, the current data protection regulation and our professional duty of confidentiality.

Key terms

It would be useful to start by explaining some key terms we use in this Privacy Notice:

We, us, our Globe Wareing Cropper, 96 Hillfoot Avenue Hunts Cross Liverpool L25 0PF, Solicitors Regulation Authority (SRA) ID No 48013, ('the controller' for the purposes of your personal data).

Our Data Protection Officer

David Charles Globe

96 Hillfoot Avenue, Hunts Cross Liverpool L25 0PF

mail: davidglobe@globesolicitors.com

Phone: 0151 486 8833

Personal data - Any information relating to an identified or identifiable living individual

Special category personal data - Personal data revealing racial or ethnic origin, political opinions, religious beliefs, or trade union membership

philosophical Genetic and biometric data - Data concerning health, sex life or sexual orientation

Personal data we collect about you

Personal data/Special category personal data (where necessary) we will collect during the course of providing you with legal services.

- Your name, address and telephone number
- Information to enable us to check and verify your identity, e.g. your date of birth or passport details for the purposes of the current anti-money laundering and other
- Information relating to the matter in which you are seeking our advice or representation
- Your financial details so far as relevant to your instructions, e.g. the source of your funds if you are instructing on a purchase transaction This personal data is required to enable us to provide our legal services to you. If you do not provide the personal data and information that we ask for, it may delay or prevent us from providing the legal services to you that you have contracted with us to carry out on your behalf.

How your personal data is collected

We collect most of this information from you. However, we may also collect information:

- from publicly accessible sources, e.g. Companies House or HM Land Registry;
- from a third party with your specific consent, e.g. your bank or building society, or other financial institution or financial advisor;
- consultants and other professionals we may engage in relation to your matter e.g. barristers, accountants, surveyors;
- your employer and/or trade union, professional bodies or pension administrators;
- your doctor(s), medical and occupational health professionals;
- via our website

How and why we use your personal data

Under current data protection legislation, we can only use your personal data if we have a proper reason for doing so, e.g.

- to comply with our legal and regulatory obligations;
- for the performance of our contract with you or to take steps at your request before entering into a contract;
- for our legitimate interests or those of a third party; or
- marketing where you have freely given specific and informed consent.
- A legitimate interest - when we have a business or commercial reason to use your information.

Marketing

We like to keep our contacts up to date and send information which we believe may be of interest to you, such as details of our services, newsletters and legal updates and invitations to events. In accordance with current data protection legislation, we must have your freely given, specific and informed consent to do this.

If you wish to give your consent to receiving marketing information with us, please complete the enclosed Communication Consent Form and then sign the form as confirmation of your consent and return it to us by either scanning and emailing it to davidglobe@globesolicitors.com or by mailing it to David Globe, Globe Wareing Cropper 96 Hillfoot Avenue Hunts Cross Liverpool L25 0PF. You are entitled to withdraw your consent to receiving marketing information from us at any time by contacting us 0151 486 8833, or by emailing the above address.

We will always treat your personal data with the utmost respect and never share it with other organisations outside of our external Marketing Consultants for marketing purposes and we will not sell your data on to any third parties

We may ask you to confirm or update your marketing preferences if you instruct us to provide further services in the future, or if there are changes in the law, regulation, or the structure of our business.

Who we share your personal data with

We routinely share personal data with:

- professional advisers who we instruct on your behalf or refer you to, e.g. barristers, medical professionals, accountants, tax advisers or other experts;
- other third parties where necessary to carry out your instructions e.g. your mortgage provider or HM Land Registry in the case of a property transaction or Companies House in the case of a business transaction;
- our insurers and brokers;
- our external marketing consultants,
- external auditors, e.g. in relation to the audit of our accounts;
- our bank;
- our external ICT providers;

- our regulators such as the Solicitors Regulation Authority, the Legal Ombudsman and the Information Commissioner's Office. We only allow our service providers to handle your personal data if we are satisfied that they take appropriate measures to protect your personal data. We also impose contractual obligations upon our service providers to ensure they can only use your personal data to provide services to us and to you. We may also disclose and exchange information with law enforcement agencies and regulatory bodies to comply with our legal and regulatory obligations.

Where your personal data is held

Information may be held at our office and those of our third party agencies, service providers, representatives and consultants as described above. How long will your personal data be kept by us? We will keep your personal data after your matter has been concluded. We will do so for one of the following purposes:

- to respond to any questions, complaints or claims made by you or on your behalf;
 - to show that we treated you fairly;
 - to enable us to carry out conflicts of interests checks
 - to keep records required by law, including compliance with the anti-money laundering legislation.
- We will not retain your data for longer than necessary for the purposes set out in this Notice. Different retention periods will apply for different types of personal data due to the legal and statutory duties under which we are obliged to operate. This means that we cannot provide you with a definitive period in relation to how long we hold your personal data as this will vary.

Transferring your personal data out of the EEA

To deliver our legal services to you, it is sometimes necessary for us to send your personal data outside the European Economic Area (EEA), e.g.

- where our service providers are located outside the EEA e.g. foreign lawyers who are assisting with your legal matter;
- if you are based outside the EEA;
- where there is an international element to the matter upon which we are advising you.

These transfers are subject to special rules under current European and UK data protection legislation. Non-EEA countries do not have the same data protection laws as the United Kingdom and EEA. We will, however, ensure that the transfer of your personal data complies with current European and UK data protection legislation and all personal data will be secure. -

If you would like further information please contact our Data Protection Officer.

Your rights

You have the following rights, which you can exercise free of charge:

Access - The right to be provided with a copy of your personal data

Rectification - The right to require us to correct any mistakes in your personal data

To be forgotten - The right to require us to delete your personal data — in certain situations

Restriction of processing - The right to require us to restrict processing of your personal data — in certain circumstances, e.g. if you contest the accuracy of the data

Data portability - The right to receive the personal data you provided to us, in a structured, commonly used and machine-readable format and/or transmit that data to a third party—in certain situations

To object The right to object:

- at any time to your personal data being processed for direct marketing (including profiling);
- in certain other situations to our continued processing of your personal data, e.g. processing carried out for the purpose of our legitimate interests.

Not to be subject to automated individual decision-making

The right not to be subject to a decision based solely on automated processing (including profiling) that produces legal effects concerning you or similarly significantly affects you

If you would like to exercise any of those rights, please email or write to our Data Protection Officer, and provide us with the following:

- **documentary evidence** of proof of your identity and address (for example a certified copy your driving licence or passport and a recent utility bill dated within the last 3 months); and
- **inform us** of which right(s) you want to exercise and the information to which your request relates.

Keeping your personal data secure

We have appropriate security measures to prevent your personal data from being accidentally lost, used or accessed unlawfully. We limit access to your personal data to those who have a genuine business need to access it. Those processing your information will do so only in an authorised manner and are subject to a duty of confidentiality. We also have procedures in place to deal with any suspected data security breach. We will notify you and any applicable regulator of a suspected data security breach where we are legally required to do so.

Complaints

We hope that we can resolve any query or concern you may raise about our use of your information. The current data protection legislation also gives you right to lodge a complaint with a supervisory authority, in particular in the European Union (or European Economic Area) state where you work, normally live or where any alleged infringement of data protection laws occurred. The supervisory authority in the UK is the ICO who may be contacted at <https://ico.org.uk/concerns> or their address which is Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF or telephone: 0303 123 1113.

Changes to this Privacy Notice

We may change this Privacy Notice from time to time.

Communication Consent Form

Declaration

I consent to Globe Wareing Cropper contacting me by text message and/or email to provide details of our services, newsletters and legal updates and invitations to events.

Name: _____
Address: _____
Date of Birth: _____
Home Tel: _____
Mobile No: _____
Email: _____

Signed: _____

Dated: _____

96 Hillfoot Avenue Hunts Cross Liverpool L25 0PF

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e-mail: info@globesolicitors.com **web:** www.globesolicitors.com

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