

PEARL BAKER SOLICITORS

## **Privacy Notice and Information for Clients**

The **General Data Protection Regulation (“GDPR”)** came into effect on 25<sup>th</sup> May 2018. It introduces amendments to United Kingdom data protection law including introducing additional rights for individuals in relation to their personal and sensitive personal data.

Pearl Baker Solicitors are committed to protecting and keeping confidential all the information you provide to us, subject to certain legal duties. These are explained to you in our letter of engagement.

You should read this Privacy Notice carefully as it contains important information about:

- who we are;
- how and why we collect, store, use and share personal information;
- your rights in relation to your personal information;
- how to contact us and supervisory authorities in the event you have a complaint.

### **Who we are**

Pearl Baker Solicitors is a legal practice authorised and regulated by the Solicitors Regulation Authority under number 69707. Under GDPR when we collect, use and retain certain personal information about you, we do so as a Data Controller, registered with the Information Commissioner’s Office (ICO).

### **The personal information we collect, use and share**

In the course of your legal transaction we collect the following personal information when you provide it to us:

- *Name, address, date of birth, contact information (telephone and email where appropriate);*
- *National Insurance number (where appropriate);*
- *Identity information and documentation;*
- *Additional information in relation to your legal transaction to enable us to advise you and progress your case. This will depend on the type of legal work you instruct us to undertake for you.*

We use your personal information primarily to enable us to provide you with a legal service in accordance with your instructions. We also use your personal information for related purposes including identity verification, administration of files, updating existing records if you have instructed us previously, analysis to help improve the management of the firm, for statutory returns and legal and regulatory compliance. The information will be held in hard copy and/or electronic format.

You are responsible for ensuring the accuracy of all the personal data you supply to us, and we will not be held liable for any errors unless you have advised us previously of any changes in your personal data.

We will only take instructions from you or someone you authorise in writing.

Where you are acting as an agent or trustee, you agree to advise your principal or the beneficiary of the trust that their personal information will be dealt with on these terms.

If we are working on your matter in conjunction with other professionals who are advising you, including experts, barristers, healthcare professionals, banks, pension providers, building societies, mortgage lenders, estate agents etc., we will assume, unless you notify us otherwise, that we may share and disclose relevant personal data and information about your matter to them, if we feel it is appropriate and necessary.

On occasions we may ask other suppliers to provide services to us and/or to you as part of our business. We will always obtain a confidentiality agreement with these outsourced providers to ensure that they keep the information sent to them securely and confidentially and that they meet GDPR obligations in relation to the service they provide to us and/or to you.

All IT providers we use are subject to confidentiality agreements with us and we will ensure that they meet GDPR obligations in relation to the service they provide to us. All of the personal information you provide to us is kept in the UK or EEA; we will not transfer any of your personal data to another country outside the UK or EEA unless you specifically instruct us to do so.

There may be occasions when we are under a legal duty to share personal information with law enforcement or other authorities, including the Solicitors Regulation Authority or the Information Commissioner. If we are required to disclose information to the National Crime Agency, we may not be able to tell you that a disclosure has been made. We may have to stop working for you for a period and may not be able to tell you why. We cannot be held liable for any loss you suffer due to delay or our failure to provide information in these circumstances.

Occasionally some of our client files may be audited strictly confidentially by external auditors or our regulators to ensure we meet our legal, quality and financial management standards. Some information may be disclosed to our professional indemnity insurers and to our financial auditors if required.

We will not share your personal information with any other third party and will not issue any publicity material or information to the media about our relationship and the work we are doing for you without your explicit consent.

#### **How long your personal data will be kept**

- We will hold your *personal data including your name, address and contact details plus your file of papers* for a period of time, depending on the nature of your case. This will normally be 7 years from the end of your case. After this period of time, your file of papers including the electronic file, will be destroyed confidentially without further reference to you, unless we contact you to confirm other arrangements or you contact us to request your file of papers at an earlier date.
- In order to meet our regulatory requirements, we may be required to retain basic information about you to include your name, address and date of birth on our electronic database for a longer period of time.

#### **Reasons we can collect and use your personal information**

We intend to rely on the following lawful bases to collect and use your personal or sensitive personal data:

- a) Your consent
- b) Contractual obligations
- c) Legal Obligations

- d) Public task
- e) Legitimate interests

## **Marketing**

Information about Pearl Baker Solicitors are available on our website [www.pearlbaker-solicitors.co.uk](http://www.pearlbaker-solicitors.co.uk) . We would encourage you to refer to this.

In relation to future marketing, we would like to keep in touch with you and let you know periodically about information that we think may be of specific interest to you or to tell you about events or developments at Pearl Baker Solicitors. We ask you to provide your email address and give specific confirmation that you want to “opt in” to us sending you such information in the future. If you provide your consent, you may withdraw it at any time by contacting us to confirm that you no longer want us to contact you. If you provide your consent, we may use third party software and services to assist us in relation to the *processing* of our marketing communications, but we will ensure we have confidentiality agreements in place and will never disclose your information to third parties for them to use for their own marketing purposes.

If you are an existing client of the firm or we are holding documents for you such as Wills or Deeds we may rely on legitimate interests as the reason for contacting you in future. We will only do this where we feel it would be of benefit to you or where we need to update you in relation to our terms and conditions.

## **Your rights**

Under GDPR you have a number of important rights, free of charge. Further information about these rights can be found on the Information Commissioners Website [www.ico.org.uk/for-the-public](http://www.ico.org.uk/for-the-public) .

If you would like to exercise any of these rights, please:

- email, call or write to the Data Protection Manager
- let us have enough information to identify you
- let us have proof of your identity and address (a copy of your driving licence or passport and a recent utility or credit card bill), and
- let us know the information to which your request relates, including any account or reference numbers, if you have them.

## **Keeping your personal information secure**

We have appropriate security measures in place to prevent personal information from being accidentally lost, used or accessed in an unauthorised way. We limit access to your personal information to those who have a genuine business need to know 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.

If you want detailed information from Get Safe Online on how to protect your information and your computers and devices against fraud, identity theft, viruses and many other online problems, please visit [www.getsafeonline.org](http://www.getsafeonline.org) . Get Safe Online is supported by HM Government and leading businesses.