

PRIVACY NOTICE

General Data Protection Regulation (GDPR)



As from the 25th May 2018 regulations to Data Protection are changing and we therefore would like to provide you with a copy of our Privacy Notice.

Our commitment

We hold information about many individuals and organisations so that we can carry out our work for clients and others efficiently and economically. As an organisation we are committed to holding all information about you securely and confidentially, whether you are our client or we need to hold information about you in relation to our work for clients, in connection with other instructions we receive or for the efficient functioning of our company. The General Data Protection Regulation requires us to provide you with certain information about the information we hold and this is set out below. If you have any questions about our policies with regard to your data please direct them to our Oswestry office in the first instance.

Who we are

Davis Meade Property Consultants Limited, office addresses:-

Oswestry Office

103 Beatrice Street
Oswestry
Shropshire
SY11 1HL

Colwyn Bay Office

Plas Eirias Business Centre
Abergele Road
Colwyn Bay
Conwy
LL29 8BF

Davis Meade Property Consultants Limited is a private limited company registered in England, Company number 06897243, registered address at the Oswestry office above.

How we collect or obtain personal data about you

We collect personal data about you when you provide it to us, such as when you contact us directly by email, telephone, in writing or in person. We may also receive data about you from third parties such as:-

- Family members
- Clients
- Other professional advisers including (but not limited to) other land agents, surveyors, solicitors, accountants
- Other providers of services to you
- Other professional bodies

and in the course of our professional activities for our clients and in connection with arbitration and other dispute-related appointments. other professional bodies etc.

The type of data we collect about you may include information such as:

- Your name
- Your address
- Your telephone number
- Your email address
- Your date of birth
- Your bank details
- Information about your business or property. The type of information we will hold will depend on the nature of the instructions we are undertaking for our client.

Data we obtain from third parties will generally be your name and contact details but may include any additional information they provide to us, including (but not limited to) any of the types of information set out in the list above.

Storing and Sharing your information

Information is held within the company on secure servers and on paper files which are stored securely when not in use. All electronic equipment which may contain your personal information is protected by secure passwords with up to date software protection.

We may need to share information about you with the following people and organisations depending on the needs of the client we are working for, or other administrative and legal requirements:

- Our client, if that is not you;
- Our clients' other professional advisers and service providers;
- Regulatory authorities and bodies where required to do so. For example this may include the Royal Institution of Chartered Surveyors which regulates the work we undertake in property valuation. Money laundering regulations may also require us to share information outside the company in certain circumstances.

Why we need to hold this data and for how long

The General Data Protection Regulation requires us to identify a legal basis for holding your information and to make you aware of your rights in connection with the information we hold. The Regulation provides six lawful bases and the basis we rely on will depend on the type of work for which we hold the data. The six lawful bases provided by the regulation are:

- Consent
- Contract
- Legal Obligation
- Public Task
- Vital Interest
- Legitimate Interest

The following paragraphs provide further information in relation to different activities we undertake.

For information about our clients and potential clients we rely on the lawful bases of contract and legal obligation. This is because we have a contract to provide services with our clients, or we are in the course of preparing a contract with a view to the provision of services. We have a legal obligation to keep records of these arrangements because of continuing liabilities for this work, and with a view to

any future engagements with our clients or former clients. We also have a legitimate interest in this information with a view to the ongoing need to ensure we do not accept work which would lead to a conflict of interest between two or more clients.

We also hold information about other people in connection with the work we undertake for our clients. An example would be information about tenants of property where we are acting for the landlord of the same property. Our lawful basis for holding this information is that we have a legitimate interest in holding the information in connection with the work we are undertaking (or have undertaken) for our client. In certain circumstances we may also be legally obliged to hold this information for other statutory purposes.

We hold information about parties to a dispute where we have been appointed to resolve the dispute. Examples would include arbitration, early neutral evaluation, mediation. In these circumstances we have a legitimate interest in holding the information and may also have a legal obligation to do so.

We hold information about our staff. The need for this arises through their contracts of employment and is therefore based on the lawful basis of contract. We also have a legal obligation and legitimate interest in holding this information to ensure compliance with our obligations as an employer.

We may hold information about you even if you are not covered by any of the categories above. For example we may hold information on individuals' names, postal and email addresses and telephone numbers for marketing purposes. In some cases this information will be held with a view to providing services to you, or because we have agreed with another service provider that we will provide services to you. An example of the latter would be the initial professional advice we offer to members of the Farming Union of Wales on referral. In most cases like this the lawful basis for holding your information is Contract or Legitimate Interest.

In any other cases not identified above we hold your information on the lawful basis of Consent.

Transfer to other countries and automated data processing

We do not routinely transfer information to any other countries. We use various providers of IT services, some of whom may be based in other countries. In these cases we ensure that our supplier has policies and procedures in place to ensure that information is held securely and in compliance with EU requirements. We do not undertake automated processing of personal data.

Criteria for retention

We hold client-related information for a minimum of six years on our paper files, after which they may be destroyed under secure arrangements. Other than information we hold only with your consent, all other information may be retained indefinitely. We may need this information in future to avoid conflicts of interest, in relation to past employment records, in order to resolve future inquiries from previous clients and in order to support other work where historical data may be useful (for example valuations which are sometimes required based on market levels some years ago).

Your rights

You have rights under the General Data Protection Regulation. These rights include:

- The right to withdraw your consent and to erasure of information about you where this is the only lawful basis on which we hold your information;

- The right to erasure where the only basis for which we hold your information is contract. However we may nevertheless have a legal obligation to retain your information for a limited period even where you seek erasure;
- You have no rights to erasure or objection where we have a legal obligation to hold information about you;
- You have a right to erasure and to object where we hold information for our legitimate interests;
- We do not hold information in a way that the right to portability of your information would apply;
- You have a right to complain to the Information Commissioners Office about the information we hold or the way we use it.

If you wish to know what information we hold about you, please make a subject access request in writing to our registered office.

The Information Commissioner can be contacted at: Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF, Tel: 0303 123 1113 (local rate) or 01625 545 745 if you prefer to use a national rate number, website: <https://ico.org.uk/>.

Review

We review this Privacy Notice from time to time as our understanding of the GDPR evolves. This review was completed in May 2018. If you have any questions about our approach to data, or suggestions which we should consider when we next review this notice please direct them to our Oswestry office.