



**DATA PROTECTION NOTICE**

As part and parcel of providing you with legal services, we will receive and retain personal data from you. It would, obviously, not be possible for us to undertake legal work for you without the ability to control and process any data that you supply to us. The General Data Protection Regulation (GDPR) and the Data Protection Act 2018 require us to identify the lawful basis upon which we rely in order to control process and retain personal data. In that respect, we rely on the fact that the processing of your personal data (including sensitive personal data) is necessary for the performance of the legal services we have agreed to provide to you and is in the course of pursuing this firm's legitimate interests.

At the outset of providing you with legal services, we would refer you to the following information:

- Our Data Protection Officer is Paul McNutt
- The categories of personal data which we commonly process include names, addresses (including e-mail addresses), ID documentation and details (such as passport, driving licence, utility bills, bank statements and ID and anti-money laundering search results), bank account details, medical records and notes, medical reports, police reports and witness statements, employment documents (such as wage/salary details and personnel files) court documents, company and corporate information and accounts, tax and financial assessments and returns, Wills and probate documents and estate accounts, records relating to family members and children
- It may be necessary to share your personal data with others in order to properly and appropriately provide you with the agreed legal services. The categories of recipients may include HM Land Registry, the Probate Department, Courts, Counsel, medical experts, surveyors, financial advisors, tax advisors and accountants, insurance companies, estate agents, our IT & website and intranet providers; our archivists (including scanning company). All of the parties we share data with will have the same duties as us pursuant to the GDPR but, where appropriate, we have entered into Data Processing Agreements with them in order to further protect our clients
- It is not our normal policy to transfer any personal data to a country outside the EU or EEA or a country with an EU Adequacy Agreement. If, however, it was necessary to

do so, we would seek your express consent in advance of such a transfer and would ensure that the appropriate safeguards were in place

- The GDPR provides you, as our client, with various rights. These include the right to be informed, a right of erasure, a right to amend/delete data, a right to request your personal information, a right to withdraw your consent to the retention or processing of data, and a right to complain to the supervisory authority. Further guidance as to your rights can be found on the website of the supervisory authority which is the Information Commissioner's Office (ICO): <https://ico.org.uk/>
- We do not have in existence any automated decision making or profiling
- On occasions, we may receive data concerning you from a third party. If we do, we will:-
  - Provide the identity and contact details of the controller (or provider) with details of the Data Protection Officer
  - Identify the purpose of the processing and the lawful basis for the processing
  - Identify the legitimate interest of the controller or third party, where applicable
  - Any recipient or categories of recipients of the data
  - Provide details of any proposed transfers to other countries and the safeguards
  - Identify the retention period or the criteria used to determine the retention period
  - Confirm the existence of your rights as the Data Subject
  - Confirm your right to withdraw consent at any time and right to lodge a complaint with the supervisory authority (the ICO)
  - Confirm the source the personal data originated from and whether or not it came from a publicly accessible sources
  - Confirm whether the controller or provider has in existence automated decision making or profiling and, if so, information about how such decisions are made, the significance and the consequences

We will provide the above information to you within a reasonable period of having obtained the data (within one month) or if disclosure to another recipient is envisaged then before the data is disclosed.

Our policy as to retaining personal data can be viewed on our website at [www.srb.co.uk](http://www.srb.co.uk) in the "More Info" section.