

Privacy Notice for our Clients

Stephen Perrott & Company Solicitors

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. Clients should read this notice alongside our general terms and conditions and terms of engagement.

Through the course of the services we provide, Stephen Perrott & Company collect, process and store personal data and on occasion sensitive personal data. We are what is known as the 'data controller' of the personal information you provide to us.

What personal information 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 some cases personal data requested will be limited 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 provide 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 your personal information

The primary reason for asking you to provide us with your personal data, is to allow us to carry out the work you have requested us to do on your behalf – 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 the source of funds
- Communicating with you
- To establish funding of your matter or transaction
- Processing your legal transaction which may include 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, non-legal or medical experts

We may use your personal information for legitimate interests such as direct marketing or under reasonable expectation to provide you with information you would expect to receive or that would benefit and enhance our relationship. This information will help us review and improve our products, services and offers.

Who has access to your information

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

Your appointed Solicitor within Stephen Perrott & Company will have access to your personal information in addition to any support and administrative staff assigned to undertake work in relation to your file. Depending on the nature of the legal work we are carrying out on your behalf, we may also 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
- A 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 including medical evidence
- Mediation services including the Labour Relations Agency
- Translation Agencies
- Contracted Suppliers
- External auditors or our Regulator; e.g. Lexcel, Law Society of Northern Ireland, 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 robust 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 staff and external parties are required to protect confidentiality of all client information; to ensure all personal data is handled and processed in line with our data protection policy.

How long will we keep personal information 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 6 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 16 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
- Personal injury matters which involve lifetime awards or PI Trusts may be kept indefinitely

What are your rights?

In certain circumstances, you have rights under data protection laws in relation to your personal data, as set out below.

If you wish to exercise any of the rights set out below, please contact us using the contact details at the start of this privacy notice. We may not have to comply with your request but we would explain why if we believe we are entitled to refuse.

Request access to your personal data (commonly known as a “data subject access request”). This enables you to receive a copy of the personal data we hold about you and to check that we are lawfully processing it.

Request correction of the personal data that we hold about you. This enables you to have any incomplete or inaccurate data we hold about you corrected, though we may need to verify the accuracy of the new data you provide to us.

Request erasure of your personal data. This enables you to ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have successfully exercised your right to object to processing (see below), where we may have processed your information unlawfully or where we are required to erase your personal data to comply with local law. Note, however, that we may not always be able to comply with your request of erasure for specific legal reasons which will be notified to you, if applicable, at the time of your request.

Object to processing of your personal data where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground as you feel it impacts on your fundamental rights and freedoms. You also have the right to object where we are processing your personal data for direct marketing purposes. In some cases, we may demonstrate that we have compelling legitimate grounds to process your information which override your rights and freedoms.

Request restriction of processing of your personal data. This enables you to ask us to suspend the processing of your personal data in the following scenarios: (a) if you want us to establish the data's accuracy; (b) where our use of the data is unlawful but you do not want us to erase it; (c) where you need us to hold the data even if we no longer require it as you need it to establish, exercise or defend legal claims; or (d) you have objected to our use of your data but we need to verify whether we have overriding legitimate grounds to use it.

Request the transfer of your personal data to you or to a third party.

Withdraw consent at any time where we are relying on consent to process your personal data. However, this will not affect the lawfulness of any processing carried out before you withdraw your consent. If you withdraw your consent, we may not be able to provide certain services to you. We will advise you if this is the case at the time you withdraw your consent.

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 social media channels, email or post. We will never send marketing communications via SMS or call you without your specific consent; nor do we ever pass on or sell your details to a third party.

If you do not wish us to continue to contact you in this way, you can either follow the unsubscribe instructions on any of our communications to you or contact us by emailing info@stephenperrott.co.uk with your name and email address. Your details will be removed immediately. Once unsubscribed, you may still receive transactional emails from us regarding your legal case.

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 Partner who will investigate further. Our Data Protection Partner is Stephen Perrott and you can contact him by email: info@stephenperrott.co.uk or telephone 028 90 428330.

Our postal address is: 49 High Street, Holywood, BT18 9AB

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).

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