



Customer Privacy Notice

This privacy notice sets out how Oldgate Trustees applies the Data Protection Principles and Rights afforded to individuals by the General Data Protection Regulations (GDPR) to the personal data that we process.

Oldgate Trustees is committed to complying with the 6 principles relating to the processing of personal data under the GDPR in all that we do.

These principles are:

- Lawfulness, fairness and transparency
- Purpose limitation
- Data minimisation
- Accuracy
- Storage limitation
- Integrity and confidentiality

“Your personal data”

Your Personal Data means any information that describes or relates to your personal circumstances. For example: name, address, date of birth, telephone number, email address, bank account details or documents that verify your identity.

Your Personal Data may also identify you indirectly for example, your employment situation, your physical and mental health history, or any other information that could be associated with your cultural or social identity.

In the context of providing you with legal assistance Your Personal Data may involve and include:

How is it collected?

Generally, the data is collected in person by our staff, partners, associates and consultants or by email, messaging services, via telephone or other similar communication systems.

Right to access

By making a request in writing or verbally, you have the right to obtain a copy of your personal data and supplemental information which we may hold. Any request would need to be responded to within one month of the date that the request is made and any information is provided free of charge.

Right to rectification

You have the right to have inaccurate/incomplete personal data updated and corrected. Much like the Right to Access, you may make such a request either in writing or verbally which will be responded to within one month of the request being made.

Right to Erasure also known as Right to be Forgotten

You have the right to obtain and reuse your personal data. Any request should be made in writing or verbally. The relevant data will be provided in a structured way, such as in Excel, word or PDF formats.

The basis upon which our Firm will deal with Your Personal Data.

When we speak with you about the legal assistance which you require, we do so on the basis that both parties are entering into a contract for the supply of services.

In order to perform that contract, we have the right to use Your Personal Data for the purposes detailed below.

Alternatively, either in the course of initial discussions with you or when the contract between us has come to an end for whatever reason, we have the right to use Your Personal Data provided it is in our legitimate business interest to do so and your rights are not affected. For example, we may need to respond to requests from mortgage lenders, insurance providers and our compliance service provider relating to the advice we have given to you, or to make contact with you to seek feedback on the service you received.

On occasion, we will use Your Personal Data for contractual responsibilities we may owe to our regulator The Solicitors Regulation Authority, or for wider compliance with any legal or regulatory obligation to which we might be subject. In such circumstances, we would be processing Your Personal Data in order to meet a legal, compliance or other regulatory obligation to which we are subject.

How do we collect Your Personal Data?

We will collect and record Your Personal Data from a variety of sources, but mainly directly from you. You will usually provide information during the course of our initial meetings or conversations with you to establish your circumstances and needs. You will provide information to us verbally or in writing, including email.

We may also obtain information from third parties, for example credit checks and searches of information in the public domain such as the voters roll. If we use technology solutions to assist in the collection of Your Personal Data for example software that is able to verify your credit status we will only do this if we have consent from you for our nominated processor to access your information in this manner. With regard to electronic ID checks we would not require your consent but will inform you of how such software operates and the purpose for which it is used.

What happens to Your Personal Data when it is disclosed to us?

In the course of handling Your Personal Data, we will record and store Your Personal Data in our paper files, mobile devices and on our computer systems (websites, email, hard drives and cloud facilities). This information can only be accessed by employees and consultants within our Firm and only when it is necessary to provide our service to you and to perform any administration tasks associated with or incidental to that service.

Share Your Personal Data

From time to time Your Personal Data may be shared with third parties who we believe will be able to assist us with your particular matter, or who are able to support your needs as identified. These third parties will include but may not be limited to, our Compliance Advisers, estate agents, providers of

legal services such as estate planners, banks, financial institutions, accountants, surveyors and valuers (in each case where we believe this to be required due to your particular circumstances).

In each case, Your Personal Data will only be shared for the purposes set out in this Customer Privacy Notice.

Please note that this sharing of Your Personal Data does not entitle such third parties to send you marketing or promotional messages: it is shared to ensure we can adequately fulfil our responsibilities to you, and as otherwise set out in this Customer Privacy Notice.

We do not envisage that the performance by us of our service will involve Your Personal Data being transferred outside of the European Economic Area.

Security and retention of Your Personal Data

Your privacy is important to us and we will keep Your Personal Data secure in accordance with our legal responsibilities. We will take reasonable steps to safeguard your own privacy when transferring information to us, such as not sending confidential information over unprotected email, ensuring email attachments are password protected or encrypted depending upon their nature and only using secure methods of postage when original documentation is being sent to us.

We also expect you to take reasonable steps to safeguard your own privacy when transferring information to us, such as not sending confidential information over unprotected email, ensuring email attachments are email protected or encrypted and only using secure methods of postage when original documentation is being sent to us.

Your Personal Data will be retained by us either electronically or in paper format for a minimum of seven years, or in instances whereby we have a legal right to such information we will retain records indefinitely.

Your rights in relation to Your Personal Data

You can:

- Request copies of Your Personal Data this is under our control;
- Ask us to further explain how we use Your Personal Data;
- Ask us to correct, delete or require us to restrict or stop using Your Personal Data (details as to the extent to which we can do this will be provided at the time of any such request);
- Ask us to send an electronic copy of Your Personal Data to another organisation should you wish;
- Change the basis of any consent you may have provided to enable us to market to you in the future (including withdrawing any consent in its entirety)

How to make contact with our Firm in relation to the use of Your Personal Data

If you have any questions or comments about this document, or wish to make contact in order to exercise any of your rights set out within it please contact:

Stuart Hamilton

Telephone: 0191 429 2637 or 07885 706724

Email: stuart.hamilton@oldgatetrustees.co.uk

If we feel we have a legal right not to deal with your request, or to action it in a different way to how you have requested, we will inform you of this at the time.

You should also make contact with us as soon as possible on you becoming aware of any unauthorised disclosure of Your Personal Data, so that we may investigate and fulfil our own regulatory obligations.

If you have any concerns or complaints as to how we have handled Your Personal Data you may lodge a complaint with the UK's data protection regulator, the ICO, who can be contacted through their website at <https://ico.org.uk/global/contact-us/> or by writing to the Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF.