



General Data Protection Regulations ("GDPR") Privacy Notice and Information for Clients

The GDPR are important European regulations which will introduce amendments to data protection law including introducing additional rights for individuals in relation to their personal and sensitive personal data. GDPR applies to all EU Member States from 25 May 2018.

Morgan Finch Solicitors are committed to protecting and keeping confidential all the information you provide to us, subject to certain legal duties.

We ask that you 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 and how to contact us and supervisory authorities in the event you have a complaint.

Who we are

Morgan Finch Solicitors is a sole practitioner practice registered in England. The registered office is at Hesketh Mount 92-96 Lord Street Southport PR8 1JR. It is a legal practice which is authorised and regulated by the Solicitors Regulation Authority under number 640490. The firm collects, uses and is responsible for certain personal information about you. When it does so it is also regulated under the GDPR by the Information Commissioner and is responsible as 'controller' of that personal information.

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 the firm to undertake

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 the firm 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.

If we are working on your matter in conjunction with other professionals who are advising you, including experts, barristers, banks, 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.

We use a private, secure, cloud computing service to assist us in processing and protecting your information and keeping it secure from the risks of cybercrime and fraud. All IT providers we use are subject to strict confidentiality agreements with this firm 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; we will not transfer any of your personal data to another country outside the UK 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 of time 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 examiners 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. Unless you tell us otherwise we will assume you have no objection. You may object at any time and refusing your consent will not affect our work for you.

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. We will confirm this to you at 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

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/.

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

- email, call or write to our Data Officer
- 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.

How to complain

We hope that our Data Officer can resolve any query or concern you raise about our use of your information.

The GDPR also gives you right to lodge a complaint with a supervisory authority. The supervisory authority in the UK is the Information Commissioner who may be contacted at www.ico.org.uk/concerns/ or telephone 0303 1231113.

Changes to this privacy notice

We may change this privacy notice from time to time. When we do we will inform you via our website or by a direct communication with you.

How to contact us

Please contact our Data Officer if you have any questions about this privacy notice or the information we hold about you.

If you wish to contact our Data Officer, please send a letter marked FAO Data Officer, Morgan Finch Solicitors, Hesketh Mount 92-96 Lord Street Southport PR8 1JR or call 01704 504361.

If you would like this notice in another format please let us know.