

## PRIVACY NOTICE

Effective date: 1 July 2026

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### 1 Intended purpose for processing

Woodstock Legal Services take data privacy very seriously. Please read this Privacy Notice carefully to understand what will happen to any personal data that we hold about you. This information is written for clients of our firm (or anyone who becomes a client). For the purposes of applicable data protection law (in particular the UK General Data Protection Regulation (EU) 2016/679 (the “UK GDPR”), your data will be controlled by Woodstock Legal Services Limited (“WLS”). References in this Policy to “this firm”, “our firm”, “we” “us” and “our” are references to WLS.

This Notice is intended to help you understand our personal data collection, usage and disclosure practices.

### 2 How you can contact us

If you have any questions or concerns about this Privacy Policy or how we process personal data, please contact our Compliance Team at [compliance@woodstocklegalservices.co.uk](mailto:compliance@woodstocklegalservices.co.uk) and mark your query ‘Data Protection’.

You can also contact our Head of Risk and Operations, Natasha Boyland at [N.Boyland@woodstocklegalservices.co.uk](mailto:N.Boyland@woodstocklegalservices.co.uk).

Our Director, Carly Jermyn can be contacted directly here: [C.Jermyn@woodstocklegalservices.co.uk](mailto:C.Jermyn@woodstocklegalservices.co.uk).

We process your personal data in accordance with this Privacy Notice and the lawful bases set out below.

Please note that this Privacy Notice does not apply to, and WLS is not responsible for, any third-party websites which may be accessible through links from or to this website. If you follow a link to any of these third-party websites, they will have their own privacy notices and you will need to check these before you submit any personal data to such third-party websites.

### 3 Who we are

WLS is a law firm. We provide legal services to individuals and companies.

### 4 Personal data that we collect

In order to provide you with legal services, for the administration of our files and records and, if you agree, to enable us to send you information about other services Woodstock Legal Services offers, we will be processing (using and storing) your personal data.

We collect and process the following personal data from you:

- **Identity and Contact Data**, which may include your name, address, telephone number, date of birth, marital status, passport number, employment history, educational or professional background, tax status, employee number, job title and function, and other personal data concerning your preferences relevant to our services. This can include personal data provided to us by or on behalf of our clients or generated by us in the course of providing our legal services, which may (if applicable) include special categories of data. This will also include identification data and data used to verify your identity, e.g., copies of passports and driving licences and evidence of the source of funds used to fund transactions that we undertake on your behalf that we use to comply with our duties under anti-money laundering and sanctions laws and which is collected when we take clients on and during the lifetime of your matter. This may also include information and results generated through client due diligence, identity verification, PEP, sanctions and risk checks carried out through approved providers such as Legl, or other relevant sources;
- **Financial and Payment Data**, which may include your bank account and other data necessary for processing payments and fraud prevention, including credit/debit card numbers, security code numbers and other related billing information;
- **Business Information**, which may include information provided in the course of the contractual or client relationship between you or your organisation and Woodstock Legal Services, or otherwise voluntarily provided by you or your organisation. This may include company information, ownership information, officeholder details and other business-related information obtained from public registers such as Companies House, or otherwise provided in connection with your matter;
- **Information relevant to our legal advice**, which may include personal data relevant to any dispute, grievance, investigation, arbitration, or other legal advice we have been asked to provide to our client;
- **Profile and Usage Data**, which may include passwords to Woodstock Legal Services website or password protected platforms or services, your preferences in receiving marketing information from us, your communication preferences and information about how you use our websites(s), including the services you viewed or searched for, page response times, download errors, length of visits and page interaction information (such as scrolling, clicks, and mouse-overs). This may include information generated when you use our website, online forms, client communication tools, client portals or any online platform used in connection with your matter;
- **Technical Data**, which may include information collected during your visits to our website, the Internet Protocol (IP) address, login data, browser type and version, device type, time zone setting, browser plug-in types and versions, operating system and platform;
- **When we use analytic cookies**, Profile and Usage Data and Technical Data (as defined above) are collected and used;
- **Physical Access Data**, relating to details of your visits to our premises;
- **Sensitive personal data**: In the course of our client services, we may represent you and/or your organisation in legal matters that require us to collect and use sensitive personal information relating to you (that is, information about your racial or ethnic origin, political opinions, religious beliefs, trade union activities, physical or mental health, sexual life and sexual orientation or details of criminal offences, or genetic or biometric data).

## 5 Information about other people

You should only give us personal data about someone else (for example, your family members or associates) with their permission, and you must make sure that they understand how their information will be used by us and by trusted third-party service providers who support the delivery of our legal services and business operations. When you provide us with personal data about

someone else, or someone discloses to us personal data about you, it may be added to the personal data we already hold and may be used in the ways described in this Privacy Policy.

## 6 How we obtain personal data about you

We may collect or receive your personal data in a number of different ways:

- **Directly from you** - where you provide it to us, for example, by meeting us, corresponding with us by email, or via other direct interactions with us such as completing a form on our website, using client communication tools such as Intercom, or using any client platform, portal or online tool made available in connection with your matter;
- **Monitoring our websites** – as a result of our monitoring use of, or interactions with, our websites, any marketing we may send to you or quotes, or other email communications sent from or received by Woodstock Legal Services;
- **Third parties** - where we collect information about you to assist with “know your client” checks as part of our client acceptance procedures to prevent fraud, money laundering and terrorist financing or where you use third parties such as managing agents or accountants and ask them to supply us with data about you; or
- **Publicly available sources** – where we use sources such as LinkedIn, Google and Facebook to help keep the information that we hold about you up to date and accurate.

## 7 How we use your personal data

The main legal grounds that justify our use of your personal data are:

- **Contract** - performance of a contract;
- **Legal obligation** - to comply with a legal obligation;
- **Legitimate interests** – to achieve our legitimate interests where our reasons for using it outweigh your data protection rights;
- **Legal claims** – to defend, prosecute or make a claim against either you or a third party;
- **Consent** – where you have given appropriate consent to our use of your personal data (please bear in mind that you are able to withdraw your consent at any time and will be told the means of doing so).

The table below explains how we use your data and the legal grounds on which we rely when we do so.

| How we use your data  | Examples   | Legal grounds processing your data                                     |
|---|--|--|
| <p><b>To provide our legal services to you and conduct our business</b></p> | <p>Contracting with you</p> <p>Administering your file</p> <p>Performing legal services</p> <p>Otherwise carrying out our contractual obligations to you</p> | <p>Contract performance</p> <p>Legitimate interests</p> <p>Consent</p> |

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|--|--|---|
| <b>To facilitate the use of our websites and ensure the content is relevant to our clients and potential clients</b> | Ensuring content from our website is relevant, up to date and presented in the right way   | Legitimate interests<br>Consent<br><br>Contract performance   |
| <b>To market our services and develop our business</b>   | To provide you with information about our services and events (subject to the right to unsubscribe or opt-out by contacting us)  | Legitimate interests<br><br>Consent   |
| <b>To conduct research and development</b>   | Analysis of responses to our website and services to improve/develop our services  | Legitimate interests<br><br>Contract performance  |
| <b>To fulfil our legal and regulatory obligations and to manage our risks</b>  | Performing client due diligence<br><br>Protecting our firm from the risk of money laundering, terrorist financing<br><br>Complying with sanctions and anti-bribery legislation Enforcing our legal rights<br><br>Complying with our regulatory reporting obligations<br><br>Protecting the rights of third parties | Legal obligations<br><br>Legitimate interests<br><br>Substantial public interest (where we process substantial public interest) or legal claims |
| <b>To manage our finances</b>  | Administering the receipt of money into our client account<br><br>Rendering invoices<br><br>Recovering payments due to us<br><br>Enforcing debts through the use of debt collection agencies   | Contract performance<br><br>Legal claims<br><br>Legitimate interests  |
| <b>To inform you of changes</b>  | Notifying you when our services or our terms and conditions change   | Legitimate interests  |
| <b>To manage client communications and support</b>   | Responding to queries, managing support requests, recording communications, progressing matter-related enquiries and handling complaints   | Contract performance; legal obligation; legitimate interests; legal claims where relevant   |

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| <p><b>To support the secure and efficient delivery of our services through approved technology tools</b></p> | <p>Using approved systems to manage documents, communications, client support, transcription, summarisation, drafting support, operational reporting and quality assurance</p> | <p>Contract performance; legal obligation; legitimate interests; legal claims where relevant</p> |
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## 8 Recipients of your personal data

In addition to our firm, we may, when required and necessary, share your personal data with other organisations. Depending on the work we are undertaking for you the other organisations may include:

- Our firm's 'data processors' who are contractors from whom we obtain operational services including IT support, message-taking, typing and secretarial support, costs draftsmen, secure document storage and shredding.
- Other 'data controllers' that provide professional or commercial services, such as Counsel, other solicitors, accountants, medical practitioners, surveyors and estate and letting agents.
- Experts that you and we agree are necessary to assist us to progress your matter.
- Providers of insurance, financial, risk management and banking services to you and/or to our firm.
- Our professional advisers where necessary to assist us in complying with our regulatory duties.
- HMRC, HM Land Registry, Councils and other national and local government bodies.
- Companies providing services for money laundering and terrorist financing checks, credit risk reduction and other crime prevention purposes and companies providing similar services including financial institutions, and credit reference agencies and regulatory bodies with whom such information is shared;
- The Solicitors Regulation Authority, the Information Commissioner's Office (ICO) and organisations involved with the preparation, assessment and certification of quality standards for which our firm is seeking or maintaining accreditation and assessing our compliance with relevant legislation;
- technology and platform providers used to support our legal services, client communications, document management, client support, analytics, secure hosting, identity verification, AI-assisted tools, workflow automation, system integrations and operational administration, including services provided by Lawhive Ltd and its approved sub-processors where relevant;
- with courts (including HM Courts & Tribunals Service), law enforcement authorities, regulators, government officials or lawyers/attorneys or other parties where it is reasonably necessary for the establishment, exercise or defence of a legal or equitable claim, or for the purposes of a confidential alternative dispute resolution process;
- if we have collected your personal data in the course of providing legal services to any of our clients, we may disclose it to that client, and where permitted by law to others for the purpose of providing those services;
- If you agree, to organisations providing marketing services to our firm.
- Enquiry Agents

Woodstock Legal Services is part of the Lawhive Group. Lawhive Ltd may provide technology, operational, administrative, compliance, customer support, data processing and platform-related services to us. Where Lawhive Ltd processes personal data on our behalf, it does so under appropriate contractual arrangements and data protection obligations.

Where Lawhive Ltd supports WLS through the Lawhive platform, Lawrence AI or related technology services, Lawhive Ltd may process personal data as our processor, or may act as an independent controller or joint controller depending on the specific processing activity and arrangements in place.

In some circumstances, Lawhive Ltd may act as an independent controller or joint controller, for example where this is required for platform analytics, AI system monitoring, or agreed technology services. Where this applies, this will be subject to appropriate governance and safeguards.

In addition, Woodstock Legal Services may in future wish to merge with another law firm. If so, we may disclose your personal data to a potential merger partner and/or their advisers, provided they agree to keep your data confidential and use it only to consider the possible transaction. If the transaction goes ahead, the merger partner may use your personal data in the same ways as are set out in this Privacy Policy.

## **9 Use of Artificial Intelligence (AI)**

In providing our legal services and operating our business, we may use AI tools to support our work. This may include tools that assist with document review, drafting support, transcription, summarising documents or meetings, legal research, client support, quality assurance and internal efficiency. This may include use of Lawhive's Lawrence AI system or other approved Lawhive technology tools to support legal guidance, document assistance, client support, matter handling, operational efficiency and quality assurance. Where relevant, this may involve processing matter-related information, prompts or queries submitted into approved AI tools, AI-generated outputs, and related interaction or audit logs used for operational, security, quality assurance and governance purposes.

AI tools are used as support tools only and do not replace the professional judgement of our solicitors, consultants or other appropriately supervised staff. Lawrence AI and any other AI tools do not make autonomous decisions about your matter. Where an AI output may affect legal advice, client communications, documents, decisions or matter handling, it will be reviewed by an appropriately qualified person before being used.

Where personal data is processed through an approved AI tool, we take steps to ensure that the supplier and the way the tool will be used have been assessed for confidentiality, data protection and security. We use the minimum amount of personal data necessary for the relevant purpose, including where special category data is involved.

We do not permit identifiable client personal data to be used to train public or foundation AI models unless this has been properly assessed, approved and clients have been notified where required. Where Lawhive or another approved provider uses anonymised or synthetic data for testing, validation, service improvement or AI model improvement, safeguards are applied so that individuals are not identifiable.

## **10 Transferring your personal data overseas**

In the course of providing our legal services, we may need to use trusted third-party service providers, including technology and platform providers, who process, store or access personal data outside the UK and European Economic Area. This may include providers used for client communications, customer support, secure hosting, analytics, AI-assisted tools, identity verification, platform services and operational support. This may include processing by Lawhive Ltd, Lawrence AI and Lawhive's approved sub-processors where they support client communications, platform services, AI-assisted tools, analytics, hosting, security, support or operational services.

Where personal data is transferred or made accessible outside the UK, we take steps to ensure that appropriate safeguards are in place. These may include UK International Data Transfer Agreements, the UK Addendum to the EU Standard Contractual Clauses, adequacy regulations, contractual protections, transfer risk assessments and appropriate technical and organisational security measures.

Intercom is one of the tools used to help manage client communications and support queries, alongside other approved technology and platform services used to support our legal services and business operations. Some personal data processed through Intercom may be processed, stored or accessed outside the UK/EEA. Where this occurs, we take steps to ensure appropriate contractual and security safeguards are in place to protect your personal data.

If you would like further information about overseas transfers relevant to your personal data, please contact us using the details in this Privacy Notice.

## **11 How long we keep your personal data**

We will retain your personal data for as long as is necessary to fulfil the purpose for which the data was collected and any other linked purpose (for example, certain details and correspondence relating to transactions in respect of which we have provided legal services may be retained by us until the time limit for claims related to the transaction has expired, or in order to comply with our regulatory obligations regarding the retention of that data). Sometimes, your personal data is used for two or more purposes, in which case we will retain it until the purpose with the latest period expires, but we will stop using the data for any other purpose with a shorter period, once that period expires.

If you want to learn more about our retention periods for your personal data you may contact us at [contact@woodstocklegalservices.co.uk](mailto:contact@woodstocklegalservices.co.uk) for a copy of our Data Retention and Erasure Policy.

Different retention periods may apply depending on the type of data, the nature of the matter, our legal and regulatory obligations, limitation periods, and any applicable requirements relating to complaints, AML, client files, accounting records or legal claims.

## **12 Keeping your data secure**

We are committed to ensuring that all information we hold about you is secure. In order to prevent unauthorised access or disclosure we have implemented appropriate physical, electronic and managerial procedures to safeguard and protect that information.

Other data controller recipients of your personal data are each responsible for implementing appropriate physical, electronic and managerial procedures to safeguard and protect that information, and to keep it secure.

Data processor recipients of your personal data have provided sufficient guarantees that they have implemented measures to ensure compliance with data protection regulations and to protect your rights.

## **13 Your rights in relation to your personal data**

You have a number of rights with respect to our use of your personal data. We explain below how you can exercise these rights.

## **Access**

You have the right to request a copy of the personal data that we hold about you. Please note that there are some exceptions to this right; for example, we may be legally prevented from disclosing such information to you or we may deny access if to do so would reveal personal data about another person.

## **Rectification**

You have the right to require us to update or correct any personal data that we hold about you that is inaccurate or incomplete. It is important to us that your data is up to date and we encourage you to contact us to let us know if personal data that we hold is not accurate or it changes.

## **Restriction**

Where certain conditions apply, you have the right to restrict the processing of your personal data.

## **Objecting**

You have the right to object to certain types of processing, including direct marketing and processing based on legitimate interests. This may include, where applicable, certain AI-related processing such as prompt logging, analytics or service improvement activities. If you would like to object, please use the contact details below.

## **Objection to automated processing, including profiling**

You also have the right not to be subject to solely automated decisions, including profiling, which have a legal or similarly significant effect on you.

## **Porting**

This means that you have the right to request that some of your personal data is provided to you, or to another data controller, in a commonly used machine-readable format.

## **Erasure**

You have the right to ask us to erase your personal data in circumstances where the personal data is no longer necessary for the purposes for which it was collected or for other reasons, including when your personal data have been unlawfully processed.

Otherwise, we will not erase or restrict the processing of your personal data during the period in which we have a legal obligation to retain that data under the applicable Act, regulations or in common law.

## **Complaints**

You have the right to make a complaint if you believe that your data protection rights have been breached.

Data protection complaints can be sent to our Compliance team at [compliance@woodstocklegalservices.co.uk](mailto:compliance@woodstocklegalservices.co.uk). You can also contact our Director & Head of Operations and Risk, Natasha Boyland, by email at [n.boyland@woodstocklegalservices.co.uk](mailto:n.boyland@woodstocklegalservices.co.uk), or by writing to us at Woodstock Legal Services, 11 Haven Road, Poole, Dorset, BH13 7LE.

We will acknowledge your complaint in writing within three working days of receiving it. We will then investigate the matter, take appropriate steps to respond, keep you informed where needed, and provide you with our outcome in line with the timescales set out below.

If you are dissatisfied with our response you may be able to complain to a supervisory authority which, in the UK, is the ICO, Wycliffe House, Water Lane, Wilmslow, Cheshire SK9 5AF. The ICO's website is at <https://ico.org.uk/>.

You may also be able to seek a remedy through the courts.

### **How to exercise your rights**

You may exercise any of the rights set out above by contacting our Head of Operations & Risk at [N.Boyland@woodstocklegalservices.co.uk](mailto:N.Boyland@woodstocklegalservices.co.uk) or [compliance@woodstocklegalservices.co.uk](mailto:compliance@woodstocklegalservices.co.uk).

In order to protect your personal data, you will need to provide a proof of your identity such as a copy of your passport, driving licence, etc.

Normally we make no charge for responding to a right of access and will endeavour to send it to you within 1 month of receipt of your request. If you notice that any of the information we send you is inaccurate or incomplete, please tell us and we will rectify it promptly.

### **14 How we use cookies and similar technologies**

When you visit our website we may use cookies and similar technologies to make the website work, improve security, understand how the website is used, and improve our services. Some cookies are necessary for the website to function. Others, such as analytics or marketing cookies, will only be used where required consent has been obtained.

We may use analytics and similar technologies, including Google Analytics where applicable, to understand website and platform usage, and improve our services. Further details about the cookies, Google services and other analytics tools we use, and how you can manage your cookie preferences, will be made available in our Cookie Policy once finalised.

### **15 How we update this Privacy Notice**

We may update this Privacy Notice from time to time to reflect changes in the law, our services, our systems, or how we process personal data. The latest version will be available on our website. Where we make material changes that affect how we process your personal data, we will take appropriate steps to bring those changes to your attention.

This Privacy Notice was last updated on 1 July 2026.