

Data Protection Policy

Purdys Solicitors Limited is issuing this data protection policy in accordance with the General Data Protection Regulations (GDPR) to explain how we will use and process any personal information which we collect in the course of our work for our clients.

What information do we collect and hold?

We will collect personal information when you instruct us to provide legal advice to you. This information will normally be names, contact details (addresses, e-mails, telephone numbers) and date of birth for you and other people involved (such as your children and beneficiaries to a Will or Trust). On Probate Matters, we may need your banking details and National Insurance Number. Also, we will ask for copies of identification documents for you and any beneficiaries.

Purdys Solicitors Limited rarely needs sensitive 'special category' personal data such as information relating to health, politics or religion, but in the event that such special category data is given to us (for example, if we need to prepare your Will more swiftly due to health concerns or if you give details of funeral wishes in line with your religious views), we shall store this information on our file and that may be stored electronically and you give that information to us with the consent to hold that information in that way. We will not share that information.

Basis of processing

The legal basis under the GDPR for the processing of personal data by Purdys Solicitors Limited is so we can perform the contract that we have with you. The information that we collect from you is necessary for us to be able to carry out the services you require from us effectively, and so we can fulfil our legal and regulatory obligations as a Law firm.

Sharing of information

Any data provided by a client is treated as confidential to that client and will only be shared with others as far as that is necessary in order to provide the services contracted for by the client, to comply with regulatory and other legal obligations and to protect this firm against a potential claim. In order to provide its services Purdys Solicitors Limited relies on the services of certain data processors. These include secure remote storage for files electronically and emails. In each case, we ensure that data is processed in compliance with this policy.

For example, we may process it with our Bank (for example, to make payments to beneficiaries), our accountant, our accounts software, the Land Registry, the Probate Registry, HMRC, the Office of the Public Guardian, Will Registers or a Conveyancing lawyer or other solicitor (for example, if a property is being sold from the estate and to transfer proceeds of sale to us or they wish us to confirm a beneficiary's identity).

We may also be required by Law to supply personal information to fulfil our legal obligations, for example in respect of the prevention of money-laundering, tax evasion or other financial crime.

We will not share personal information for marketing purposes with any other firm, sole trader or company. If we wish to supply information to another law firm as a merging or successor practice, this will only be done in accordance with our professional obligation of client confidentiality.

How long do we keep personal information?

We will retain personal data securely after we have completed our contract for legal services to comply with regulatory requirements to retain such data for specified minimum periods, and in case we are required to defend any future claim against us. We may therefore retain personal data for a minimum of six years.

Further communications and marketing

Purdys Solicitors do not currently and do not anticipate carrying out any postal or email marketing. However, after completing our contracted legal work for you, we might occasionally like to contact you by e-mail (with your consent) or by post when, in accordance with the GDPR, there is a legitimate interest:

- keeping you informed in respect of legal matters or developments which we believe will be of assistance to you, or
- in updating you as to the legal work of Purdys Solicitors Limited (for example, if we move address, so you know where your original documents are stored).

You have a right to stop us from contacting you for marketing or other purposes. If you do not wish to be contacted, or you wish to express a preference as to the method of contact, please inform us by e-mail or post using our contact details below.

Your right to access the personal information we hold

You have the right to request a copy of the information that we hold about you. If you would like a copy of some or all of your personal information, please e-mail or write to us using our contact details below and we will respond to this request within one month.

We have an obligation to ensure that your personal information is accurate and up to date. Please ask us to correct or remove any information that you think is inaccurate.

Deletion of personal information

You have the right to request deletion of your personal data and we will comply with this request, subject to our regulatory and legal obligations.

How to make a complaint

To exercise all relevant rights, queries or complaints please contact the Data Controller, who is sole principal Solicitor and Director, Karen Purdy Karen@purdys-solicitors.co.uk

If this does not resolve your complaint to your satisfaction, you have the right to lodge a complaint with the Information Commissioners Office on 03031231113 or via email <https://ico.org.uk/global/contact-us/email/> or at the Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF, England.