

## **Customer Privacy Notice**

### **Why should you read this document?**

During the course of dealing with us, we may ask you to provide us with detailed personal information relating to your existing circumstances and your financial situation (**Your Personal Data**). This document is important as it allows us to explain to you what we will need to do with Your Personal Data, and the various rights you have in relation to Your Personal Data.

### **What do we mean by “Your Personal Data”?**

Your Personal Data means any information that describes or relates to your personal circumstances. Your Personal Data may identify you directly, for example your name, address, date of birth, Passport number. Your Personal Data may also identify you indirectly, for example, utility bills, invoices, accounts, lease agreements etc.

In the context of providing you with assistance in relation to your Property requirements Your Personal Data may include:

- Title, names, date of birth, gender, nationality, civil/marital status, contact details, addresses and documents that are necessary to verify your identity
- Bank account details, bank references, utility bills, company accounts, service charge accounts, copy invoices, buildings insurance documents (with premiums paid)
- Any pre-existing Investment properties, lease documents, building plans, building photographs and utility meter photographs (to confirm meter readings)

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

When we speak with you about your Property requirements we do so on the basis that both parties are entering a contract for the supply of services.

In order to perform that contract, and to arrange the services you require, 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 insurance providers, and HMRC for tax purposes or our Regulatory Body – the Royal Institution of Chartered Surveyors (RICS) for such matters as Money Laundering for which we have Compliance Requirements. 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, needs and preferences in relation to your Property or Property Requirements. You will provide information to us verbally and in writing, including email.

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 us or our nominated processor to access your information in this manner. With regards 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
- Use Your Personal Data for the purposes of responding to any queries you may have in relation to any specific property or properties you may hold an interest in, or to inform you of any developments in relation to that/those property/properties and/or properties of which we might become aware

### **Sharing Your Personal Data**

We will not share your personal data with any third parties.

The only time we would do so is if we have your express and written consent to do so in order to expedite legal documentation such as your solicitors for legal documentation, such as leases, to be drafted and as set out in this customer private noticed, i.e. to progress your Property Requirements and to provide you with our professional services.

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 Personal Data against it being accessed unlawfully or maliciously by a third party.

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 password 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 six years, or in instances whereby we have 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 that 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)

- 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 Reeves & Partners Limited 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:

*Reeves & Partners Ltd, 2 Euston Place, Leamington Spa, CV32 4LE (Ref: Stuart Gregory, email: [Stuart@reevesandpartners.com](mailto:Stuart@reevesandpartners.com) tel: 01926 427100)*

If we feel we have a legal right not to deal with your request, or to action, it in 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 Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF.

