

## Privacy Policy

This policy outlines how Bay Tree Solicitors may collect and use your Personal Data. We use Personal Data so we can provide our business service. We consider our responsibility to handle your Personal Data carefully of utmost importance and therefore comply with privacy legislation as explained in this Privacy Policy.

This policy is regularly reviewed and may be updated at any time. Previous versions can be requested if needed.

This policy is to be read alongside our terms and conditions of business.

Bay Tree Solicitors Ltd is a company registered with Companies House number 09873205 and our registered office is 61 Fore Street Topsham Devon EX3 0HL. Our data protection officer is Emily Dushynsky. You can contact her by phoning 01392925926 or by email [ed@baytreesolicitors.co.uk](mailto:ed@baytreesolicitors.co.uk)

### Whose data we hold

We may hold data for the following:

- Clients
- Suppliers and service providers
- Enquirers
- Advisers, consultants and other professionals

### Categories of data

Due to nature of the work we do for you it is likely we will collect and hold different types of data. Examples of Data we are likely to collect will be

- |               |                  |
|---------------|------------------|
| Personal data | Full name        |
|               | Address          |
|               | Telephone Number |
|               | Email address    |
|               | Date of birth    |

	Place of birth and nationality
Family information	Family tree, Names and address of relatives, dates of birth, telephone numbers
Financial information	Bank and building society, savings and investments, property, utility bill, mortgages
Medical information	Name of doctor and Surgery, NHS number, details of medical conditions

Occasionally we may need to collect special or sensitive data such as

Race

Religion

Sexual orientation

### How we collect data

We collect data from you directly when we make initial enquiries, when we take your instructions and at other times as your matter proceeds. We may also collect data from third parties such as other professionals, banks and financial institutions and medical data from your doctor.

In accordance with the money laundering regulations we also need to verify your identity and will collect data to confirm your identity.

If you provide us with data of third parties we will assume you have permission to do so and you have informed the third party concerned.

If we need to collect your Personal Data to act under our agreed instructions and you fail to provide it we may not be able to continue.

### How we use data

The data we collect from you is used

To advise our clients which may include

Dealing with your files

Letters, emails and telephoning you or third parties such as banks or doctors

To review our response to enquirers

To comply with our legal and regulatory obligations

Record keeping

Financial management

Data may be shared to meet our accounting obligations or for reporting to HMRC for tax returns.

### **Sharing data**

Depending on the work we are carrying out for you we may share your data with the following to provide the services you have instructed us to do or to fulfil our statutory obligations

Medical professionals

Court

HM Revenue and Customs

Financial institutions

Other business professionals

Your family or representatives

Ombudsman and regulatory authorities

Central government

Suppliers and service providers

As we are regulated by the Solicitors Regulation Authority (SRA) we comply with the duty of confidentiality and disclosure as set out in the SRA handbook

### **How long will we keep your data**

We will keep your data for as long as needed to complete the work you have instructed us to do. We will not keep it for any longer than is necessary to do this.

You can always withdraw your permission for us to hold and process your personal data but we may no longer be able to carry out the work you have asked us to do. You can also view or correct your Personal Data by contacting us at any time.

You may also submit a request for us to send your Personal Data to you or any third party stated by you. If you make such a request you must also provide a copy of your identity documents. We will respond to this as quickly as possible and within three weeks.

### Complaints

If you have concerns about the way we collect, hold or process your Personal Data and wish to make a complaint please get in touch and we can work together to reach a solution. You also have the right to submit a complaint to the Data Protection Authority.

### Cookies

Cookies are small files collected from your computer, tablet or smart phone when you visit our website. We only use these cookies for the functioning of our website. You can remove all information collected via your own browser settings.