

## **Charles and Co Solicitors Limited**

### **Privacy Policy:**

#### **Who are we?**

Charles and Co Solicitors Limited incorporated in England and Wales and is a “controller” under the General Data Protection Regulation and the Data Protection Act 2018.

#### **Whose data do we hold?**

We may hold data about the following people:

- Employees
- Customers and Clients
- Suppliers and service providers
- Advisers, consultants and other professional experts
- Complainants and enquirers

#### **What data will we collect?**

We will only collect information from you that is relevant to the matter that we are dealing with. In particular we may collect the following information from you which is defined as “personal data”:

- Personal details
- Family, lifestyle and social circumstances
- Financial details
- Business activities of the person whose details we are processing

#### **Special Categories**

We may also collect information that is referred to as being in a “special category”. This could include:

- Physical or mental health details
- Racial or ethnic origin
- Religious beliefs or other beliefs of a similar nature
- Criminal convictions
- Sexual orientation

#### **Basis for processing**

The basis on which we process your personal data is one or more of the following:

- It is necessary for the performance of our contract with you
- It is necessary for us to comply with a legal obligation
- It is in our legitimate interests to do so
- You have given us your consent (this can be withdrawn at any time by advising our data protection officer)

#### **How will we use your data?**

We may use your information for the following purposes:

- Provision of legal services including advising and acting on behalf of clients

- Promotion of our goods and services
- Provision of education and training to customers and clients
- Maintaining accounts and records
- Supporting and managing staff

### **Who will we share your information with?**

Under our Code of Conduct there are very strict rules about who we can share your information with and this will normally be limited to other people who will assist with your matter. This may include:

- Barristers
- Medical Experts
- Private investigators
- Healthcare professionals, social and welfare organisations
- Courts and tribunals

Where you authorise us we may also disclose your information to your family, associates or representatives and we may also disclose your information to debt collection agencies if you do not pay our bills.

### **How long will we keep your information for?**

- We will normally keep your information throughout the period of time that we do work for you and afterwards for a period of six years as we are required to do by law and also by the regulations that apply to us.
- In some cases (for example where we have prepared a will for you) we may retain your information for a longer period and we will advise you of this at the time
- More information is set out in our data retention policy which is available on request from the data protection officer

### **Transfers to third countries**

- We may from time to time transfer your personal data to a country outside of the EEA.
- Normally this will be necessary for the performance of your contract with us or for the exercise or defence of legal claims on your behalf
- Sometimes we may transfer for other reasons and we will ensure that appropriate safeguards are in place at all times.

### **Security arrangements**

- We shall ensure that all the information that you provide to us is kept secure using appropriate technical and organisational measures
- In the event of a personal data breach we have in place procedures to ensure that the effects of such a breach are minimised and shall liaise with the ICO and with you as appropriate.
- More information is available from the data protection officer

### **What rights do you have?**

You have the following rights under the GDPR:

- Right to be informed

- Right of access
- Right of rectification
- Right to erasure
- Right to restriction of processing
- Right to data portability
- Right to object
- Rights concerning automated decision-making and profiling

#### **Right of access**

- You have a right to see the information we hold about you
- To access this you need to provide a request in writing to our data protection officer, together with proof of identity
- We will usually process your request free of charge and within 30 days however we reserve the right to charge a reasonable administration fee and to extend the period of time by a further two months if the request is manifestly unfounded or vexatious and/or is very complex
- Full details are available in our data subject access policy which is available on request from the data protection officer

#### **Right to erasure**

- You have a right to ask us to erase your personal data in certain cases (details may be found in Article 17 of the GDPR)
- We will deal with your request free of charge and within 30 days but reserve the right to refuse to erase information that we are required to retain by law or regulation, or that is required to exercise or defend legal claims
- To exercise your right to erasure please contact our data protection officer

#### **Who can you complain to?**

- If you are unhappy about how we are using your information or how we have responded to your request then initially you should contact the data protection officer Jagdip Chahal.
- If your complaint remains unresolved then you can contact the Information Commissioner's Office, details available at [www.ico.org.uk](http://www.ico.org.uk)