

PORTRAIT SOLICITORS
CLIENT PRIVACY NOTICE

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1. Key Terms

The key terms used in this Privacy Policy are:

1.1 We, us, our: Portrait Solicitors of 21 Whitefriars Street London EC4Y 8JJ

1.2 Our Data Protection Officer:

Dominic Flynn
dominic.flynn@portraitsolicitors.com
whose telephone number is 0207 092 6982

1.3 Personal Data:

Only information that may be used to identify you.

1.4 Special Category Data:

Personal data that reveals your racial or ethnic origin, your political opinions, religious or philosophical beliefs, trade union memberships, genetic or biometric data or any information concerning your sex life or sexual orientation, or your health.

1.5 Legitimate Interests

We have legitimate business interests in:

- Providing legal services;
- Managing our business and relationship with you, your company or organisation;
- Understanding and responding to enquiries and client feedback;
- Understanding how our clients use our service and websites;
- Identifying what our clients want and developing our relationship with you, your company or organisation;
- Improving our services and offerings;
- Enforcing our terms of engagement and website and other terms and conditions;

- Ensuring our systems and premises are secure;
- Managing our supply chain;
- Developing relationships with business partners;
- Ensuring debts are paid;
- Operating suppressers to exclude you from direct marketing if you unsubscribe; and
- Sharing data in connection with acquisitions and transfers of our business.

2. Personal data we collect about you

- 2.1 We will collect the following information from you:
 - 2.1.1 Your name, address, telephone number and electronic contact details;
 - 2.1.2 Information to enable us to check and verify your identity e.g. your date of birth or passport details;
 - 2.1.3 Information relating to the matter in which you are seeking our advice or representation; and
 - 2.1.4 Your financial details as far as relevant to your instructions e.g. details of your assets and liabilities if you instruct us in connection with the preparation of a Will or other estate planning.
- 2.2 We may collect the following information, depending on the type of matter on which you have instructed us:
 - 2.2.1 Your National Insurance and tax details;
 - 2.2.2 Your Bank and/or Building Society details;
 - 2.2.3 Information from public sources; and
 - 2.2.4 Details of your spouse/partner and dependents or other family members if you instruct us on a family matter or a Will.
- 2.3 This personal data is required to enable us to provide our service to you. If you do not provide the personal data we ask for, it may delay or prevent us from providing services to you.

3. How we collect all personal data?

We collect most data from you directly. However, we may also collect information:

- 3.1 From publically accessible sources;
- 3.2 Directly from a third party, e.g. :
 - 3.2.1 sanctions screening providers;
 - 3.2.2 credit reference agencies; and
 - 3.2.3 client due diligence providers;
- 3.3 From third parties with your consent, e.g. your accountant, bank, investment manager or independent financial adviser;
- 3.4 Via our website. We do not currently use cookies on our website; and
- 3.5 Via our information technology (IT systems) e.g.:
 - 3.5.1 document management and time recording systems; and
 - 3.5.2 automated monitoring of our website and other technical systems.

4. How and why we use your personal data?

We use your personal data for the following reasons:

- 4.1 For the performance of our engagement contract with you or to take steps at your request before entering into an engagement contract;
- 4.2 To comply with our legal and regulatory obligations;
- 4.3 For our Legitimate Interests or those with a third party;
- 4.4 Where you have given us your consent;
- 4.5 We will process your personal data for a number of reasons:
 - 4.5.1 You have given us consent;
 - 4.5.2 This is necessary to comply with legal or regulatory obligations;
 - 4.5.3 This is necessary to deal with legal claims;
 - 4.5.4 Processing is necessary for our Legitimate Interests or those of a third party;
- 4.6 We will process Special Category Data where:
 - 4.6.1 We have your explicit consent;
 - 4.6.2 This is necessary to protect your vital interests or those of another person;
 - 4.6.3 This is necessary to deal with legal claims;
 - 4.6.4 This is necessary for substantial public interests;
 - 4.6.5 As permitted by applicable law.

5. Communications about additional services

- 5.1 We may use your personal data to send you updates by email or by post about legal developments that may be of interest to you and/or information about our services, including new services, or invitations to events we believe may be of interest to you.
- 5.2 We will seek your express consent to such communications to you.
- 5.3 We will always treat your personal data with the utmost care and never sell it to other organisations for marketing purposes.
- 5.4 You have the right to opt out if receiving unprompted communications at any time.
- 5.5 We may ask you to confirm or update your preferences if you instruct us to provide further services in the future, or if there are changes in the law, regulation, or the structure of our business.

6. With whom do we share your personal data?

- 6.1 We may share your personal data with:
 - 6.1.1 External service suppliers, representatives and agents that we use to make our business more efficient;
 - 6.1.2 Professional advisers who we instruct on your behalf or refer to;
 - 6.1.3 Other law firms;
 - 6.1.4 Other third parties where necessary to carry out your instructions;
 - 6.1.5 Credit reference agencies;
 - 6.1.6 Our insurers and brokers;
 - 6.1.7 External auditors, e.g. in relation to auditors of our files under our accounts;
 - 6.1.8 Our Bank;
 - 6.1.9 Legal and regulatory authorities with whom we have a legal obligation to share your data, e.g. HMRC, or to report any potential or actual breach of a particular law or regulation;
 - 6.1.10 Law enforcement agencies, courts or other relevant parties, to the extent necessary for the establishment, exercise or defence of legal rights;
 - 6.1.11 Third parties where necessary for the purposes of prevention, investigation, detention or prosecution of criminal offences or the execution of criminal penalties; or
 - 6.1.12 Third parties who are considering or have decided to buy some or all of our assets or business.
- 6.2 We only allow our service providers to handle your personal data if we are satisfied that they take appropriate measures to protect your personal data. We also impose contractual obligations on service providers to ensure they can only use your personal data to provide services to us and to you.

7. Where will your information be held?

- 7.1 In order to deliver services to you, it is sometimes necessary for us to share your personal data outside the European Economic Area (EEA) e.g.:
 - 7.1.1 With our service providers located outside the EEA;
 - 7.1.2 If you are based outside the EEA; or
 - 7.1.3 Where there is an international dimension to the matter;
- 7.2 These transfers are subject to special rules under European and UK Data Protection Law;
- 7.3 Countries outside the EEA do not have the same Data Protection Laws as the United Kingdom and EEA. We will, however, ensure that the transfer complies with Data Protection Law either:
 - 7.3.1 By ensuring we put in place standard data protection contractual clauses between us and the recipient of your data; or
 - 7.3.2 On the basis of an adequacy decision, namely:
 - (a) the Privacy Shield for transfers of data to the US; or
 - (b) where the European Commission has decided that the relevant non-EEA country has in place an adequate level of protection.

8. How long will your data will be kept?

We generally keep your information as needed to provide our legal services and to deal with clients. This will depend on a number of factors. We will retain your information as necessary to comply with legal accounting or regulatory requirements.

9. Your rights

- 9.1 Subject to applicable law, including relevant data protection laws, you may have a number of rights in connection with the processing of your personal data including:
- 9.1.1 The right to request access to your personal data that we process or control;
 - 9.1.2 The right to request rectification of any inaccuracies in your personal data or, taking into account the purposes of our processing, to request that incomplete data is completed;
 - 9.1.3 The right to request, on legitimate grounds, as specified in law:
 - (a) erasure of your personal data that we process or control; or
 - (b) restriction of the processing of your personal data that we possess or control.
 - 9.1.4 The right to object, on legitimate grounds as specified in law, to the processing of your personal data;
 - 9.1.5 The right to receive your personal data in a structured, commonly used and machine readable format and to have your personal data transferred to another controller, to the extent applicable in law; and
 - 9.1.6 The right to lodge complaints regarding the processing of your personal data with the Information Commissioner's Office or other relevant supervisory body. Please see <https://ico.org.uk/concerns/> for how to do this.
- 9.2 If you would like to exercise any of the rights set out above, please:
- 9.2.1 Email or write to our Data Protection Officer;
 - 9.2.2 Let us have enough information to identify you, (e.g. your full name and client or matter reference number); and
 - 9.2.3 Let us know what right you wish to exercise and the information to which your request relates.

10. Changes to this notice

This notice may be changed from time to time.

11. How to contact us?

Please contact your client partner identified in your Engagement Letter and our Data Protection Officer (see details in Section 1) by post or email if you have any questions about this privacy policy or the information we hold about you.

**PORTRAIT SOLICITORS
PRIVACY NOTICE (FIRST EDITION) – AUGUST 2018**