

Privacy Policy Statement

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| Created By | Sarah Norris, Office Manager |
| Date of Policy | June 2024 |
| Review Date | June 2026 |



1. INTRODUCTION

This privacy policy statement explains how and why we use your personal data, to ensure you remain informed and in control of your information. The current version of our privacy policy will always be posted on our website.

Contact Details

If you have any questions about how we use your personal information, please contact Ieuan Lavender, Director, by post, telephone or email.

North Ground Suite, The Wheelhouse, Bonds Mill, Stonehouse, Gloucestershire, GL10 3RF
01452 306214
info@adamsfletcher.com

2. ABOUT US

Adams Fletcher & Partners will collect only the required data about you to allow us to perform our duties under our appointment with you. Our duties comprise of **providing services and goods, including delivery; and the operation of customer accounts and guarantees.**

3. WHAT INFORMATION WILL WE COLLECT

Personal data you provide

We collect or use only data that you provide to us, this includes:

Information you give when making an enquiry with us or through our appointment with you

- personal details (name, email, address, telephone etc.)
- financial information

Information created by your engagement with us

Your activities and involvement with Adams Fletcher & Partners may result in personal data being created.

- details of projects
- financial information and other sensitive information relating to finance
- purchase or account history
- photographs or video recordings
- information relating to compliments or complaints

Information from third parties

We may sometimes share personal data about you with third parties. For example, if we are partnering with another company to provide part of our services and you have previously given permission to share information about you.

Sensitive personal data

We do not collect or store sensitive personal data (such as information relating to health, beliefs or political affiliation) about our clients.

4. HOW WE USE INFORMATION

We only ever use your personal data with your consent, or where it is necessary to:

- enter into, or perform, a contract with you
- comply with a legal duty
- protect your interests
- for our own (or a third party's) lawful interests, provided your rights don't override these

In any event, we'll only use your personal data for the purpose(s) it was collected for, this includes administrative purposes, maintaining client databases for project administration, and performing our obligations under our appointment with you.

5. DISCLOSING AND SHARING DATA

We will **never** disclose or sell your personal data.

Our data processor, ReformIT, manage our IT systems and may have access to your personal information. We may share personal data with subcontractors or suppliers who provide us with services e.g., a subcontractor appointed to conduct a survey would require your contact details.

Any such activities will be carried out with strict requirements on our supplier to keep your information confidential and secure.

6. MARKETING

Where appropriate, we may make periodic contact with you to keep you informed of services we offer. You have the right to opt out of such correspondence at any time.

7. HOW WE PROTECT YOUR DATA AND WHERE WE STORE IT

All company project data (including personal data relating to clients) is stored on computers with a specialist IT company employed to maintain our IT systems meeting the highest levels of security. We use various applications alongside Microsoft products, including SharePoint, to store data. Access to data at any level is governed by a strict set of permissions which restrict access to only the essential members of staff. In the unlikely event that we do need to collect personal data on paper, we would transfer it to a secure electronic format as soon as possible and securely destroy the paper copy.

How long will we keep your personal data

We will not keep your personal data longer than is required. We are required by RICS regulations to keep project data (which would include Client details) for a period of 6 years. Furthermore, if a project used a contract signed as a deed, then we would need to keep the project data for a period of 12 years.

Links to other sites

Our website may contain links to other websites. We are not responsible for the content or functionality of any of those external websites. If an external website requests personal information from you, the information you provide will not be covered by Adams Fletcher & Partners Privacy Policy. We suggest you read the privacy policy of any website before providing any personal information.

8. YOUR DATA PROTECTION RIGHTS

We want to ensure you remain in control of your personal data. Part of this is making sure you understand your legal rights under data protection law, which includes:

Your right of access - You have the right to ask us for copies of your personal data.

Your right to rectification - You have the right to ask us to rectify personal data you think is inaccurate. You also have the right to ask us to complete information you think is incomplete.

Your right to erasure - You have the right to ask us to erase your personal data in certain circumstances.

Your right to restriction of processing - You have the right to ask us to restrict the processing of your personal data in certain circumstances.

Your right to object to processing - You have the right to object to the processing of your personal data in certain circumstances.

Your right to data portability - You have the right to ask that we transfer the personal data you gave us to another organisation, or to you, in certain circumstances.

Your right to withdraw consent – When we use consent as our lawful basis you have the right to withdraw your consent.

You do not usually need to pay a fee to exercise your rights. If you make a request, we have one calendar month to respond to you. To make a data protection rights request, please contact us using the contact details at the top of this privacy notice.

How to complain

If you have any concerns about our use of your personal data, you can make a complaint to us using the contact details at the top of this privacy notice. If you remain unhappy with how we have used your data after raising a complaint with us, you can also complain to the ICO using the following details:

Information Commissioner's Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF

Helpline number: 0303 123 1113

Website: <https://www.ico.org.uk/make-a-complaint>

APPROVED BY:



IEUAN LAVENDER

DIRECTOR

DATE

16/01/2025