

# PRIVACY POLICY

This Privacy Policy sets out how we handle the personal information which you (as our client) provide to us within the context of using our legal services (“Services”). In collecting this information, we are acting as a data controller and, by law, we are required to provide you with information about us, about why and how we use your data, and about the rights you have over your data. You are deemed to accept the terms of this Privacy Policy when you instruct this firm. We may change this Privacy Policy from time to time and such changes shall be effective from the date and time the revised Privacy Policy is posted on this website (the “Site”).

This Policy contains information about:

1. Who we are
2. Children
3. What is personal data and special category data?
4. Why we collect your personal information?
5. How is your data collected?
6. How we use your data?
7. Who has access to your data?
8. How long we keep information?
9. How we keep information secure?
10. Your rights
11. How we provide the information?
12. Can you see all the information we hold about you?
13. Information sharing and third parties
14. Information collected from third parties
15. Transferring your personal data out of the EEA
16. Updates to this Privacy Policy

## 1. Who we are

This Site, is owned by Morris Read & Co of Wulfrun House 51 Waterloo Road Wolverhampton WV1 4QJ and governs the privacy of those who use it. Morris Read & Co is the data controller. Any enquiries about our use of your personal data should be addressed to the contact details above.

You are entitled to view, amend, or delete the personal information that we hold about you. Email your request to our Data Protection Officer Sundeep Sandhu at the following email address: [sundeep@morrisread.co.uk](mailto:sundeep@morrisread.co.uk)

## 2. Children

Our Site and services are not aimed specifically at children because children are generally represented by their parent or guardians. If you are a child and need further advice or explanation about how we would use your data, please email [enquiries@morrisread.co.uk](mailto:enquiries@morrisread.co.uk)

## 3. What is personal data and special category data?

Personal data is defined in the GDPR as any information relating to an identified or identifiable natural person. It can include obvious data like your name but also identification numbers, online identifiers and/or one or more factors specific to the physical, physiological, genetic, mental, economic, cultural or social identity of that person.

Special category data includes data revealing race or ethnic origin, political opinions, religious or philosophical beliefs, or trade union membership, and genetic data, biometric data, data concerning health or data concerning a person's sex life or sexual orientation.

## 4. Why we collect your personal information?

This policy applies to information we collect about:

- visitors to our Site
- employees or applicants
- service providers
- clients
- people who make enquiries
- others connected to our work

What type of information we may collect:

- Normal personal data including your name, address, telephone number, date of birth, email address, geographical/location details, bank account details, employment details, National Insurance number, educational qualifications;
- Personal financial data;

- Personal identity – we retain copies of passports or identity documents to verify your identity;
- Special categories of personal data – for example we may process data concerning your health if you give this to us;
- CCTV images or photos when attending our meetings or events;
- Call recordings.

As a legal services firm, most of the personal data we process is data relating to our contractual functions, powers and duties. Data may also be processed because it is necessary for the pursuit of our legitimate interests and/or the legitimate interests of others.

There may be occasions where we process data to comply with legal obligations, particularly in the context of legal proceedings and/or compliance with requests by law enforcement agencies, for example; although, even in these cases, our regulatory functions will also generally be engaged.

We will not generally rely on consent as a basis for processing personal data. In the limited circumstances where we may rely upon consent, we will specifically obtain this in the course of collecting the data.

We may also use data to improve our level of service. Where we do this, we do it to help inform us how to improve the way we work since both we and those we deal with have an interest in us doing so. We may for instance, monitor and/or record calls for quality and accuracy purposes.

## If you fail to provide personal data

Where we need to collect personal data by law, or under the terms of a contract we have with you and you fail to provide that data when requested, we may not be able to provide Services. If you choose not to give us your consent for our mailing list, there will be no effect on your legal contract with us.

## 5. How is your data collected?

We use different methods to collect data from and about you including:

### Directly

You may give us your identity and contact details by filling in forms or by corresponding with us by post, phone, and email or otherwise. This includes personal data you provide when you:

- Make an enquiry about our services or instruct us;
- Give us some feedback;
- When you leave a review

## Automated technologies or interactions.

As you interact with our website, we may automatically collect technical data about your equipment, browsing actions and patterns. We collect this personal data by using cookies, and other similar technologies. We may also receive technical data about you if you visit other websites employing our cookies.

## Third parties or publicly available sources.

We may receive personal data e.g. computer IP address, about you from various third parties and public sources as set out below:

- Technical data from the following parties: analytics providers such as Google based outside the EU;
- Contact, financial and transaction Data from providers of technical, payment and delivery services.
- Identity and Contact Data from publicly available sources such as Companies House and the Electoral Register based inside the EU.
- Referrals and opponents.
- Enquiries made electronically or over the telephone

The nature of our work means that we handle personal information about third parties who are, in some way, connected to the work we do. This category is broad and examples include experts including but not limited to financial advisors, mortgage brokers and estate agents.

## 6. How we use your data?

We will only use your personal data when the law allows us to. Most commonly, we will use your personal data in the following circumstances:

- Where we need to perform the contract we are about to enter into or have entered into with you.

- Where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests.
- Where we need to comply with a legal or regulatory obligation.
- Marketing purposes

Generally, we do not rely on consent as a legal basis for processing your personal data other than in relation to sending direct marketing communications to you via email or by post. You have the right to withdraw consent to marketing at any time by contacting us at [enquiries@morrisread.co.uk](mailto:enquiries@morrisread.co.uk).

We may contact you for the purpose of direct marketing. This means that we may use your personal data that we have collected in accordance with this privacy policy to contact you about our products or services, events etc. We may use your identity, contact, technical, usage and profile data to form a view on what we think you may want or need, or what may be of interest to you. The direct marketing communications may be provided to you by social media channels, email or post. We will never send marketing communications via SMS or call you without your specific consent; nor do we ever pass on or sell your details to a third party.

You will receive marketing communications from us if you have requested information from us or purchased services from us or if you provided us with your details and, in each case, you have not opted out of receiving that marketing.

## 7. Who has access to your data?

We have a data protection regime in place to oversee the effective and secure processing of your personal data. We will not sell or rent your information to third parties. We will not share your information with third parties for marketing purposes.

Generally, we will only use your information within the firm. However, there may be circumstances, in carrying out your legal work, where we may need to disclose some information to third parties; for example:

- Search providers
- Land Registry to register a property
- HM Revenue & Customs; e.g. for Stamp Duty Liability or Inheritance Tax
- Court or Tribunal
- Solicitors acting for the other party
- Asking an independent Barrister or Counsel for advice; or to represent you

- Non legal experts to obtain advice or assistance
- Translation Agencies
- Contracted Suppliers
- External auditors or our Regulator
- Bank or Building Society; or other financial institutions
- Insurance Companies
- Providers of identity verification
- Any disclosure required by law or regulation; such as the prevention of financial crime and terrorism
- If there is an emergency and we think you or others are at risk

In the event any of your information is shared with the aforementioned third parties, we ensure that they comply, strictly and confidentially, with our instructions and they do not use your personal information for their own purposes unless you have explicitly consented to them doing so.

There may be some uses of personal data that may require your specific consent. If this is the case we will contact you separately to ask for your consent which you are free to withdraw at any time.

## 8. How long we keep the information for?

Your personal information will be retained, usually in computer or manual files, only for as long as necessary to fulfil the purposes for which the information was collected; or as required by law; or as long as is set out in any relevant contract you may hold with us. For example:

- As long as necessary to carry out your legal work
- For a minimum of 7 years from the conclusion or closure of your legal work; in case you, or we, need to re-open your case for the purpose of defending complaints or claims against us
- For the duration of a trust
- Some information or matters may be kept for 16 years – such as commercial transactions or sales of leasehold purchases
- Probate matters where there is a surviving spouse or civil partner may be retained until the survivor has died in order to deal with the transferable Inheritance Tax allowance
- Wills and related documents may be kept indefinitely
- Deeds related to unregistered property may be kept indefinitely as they evidence ownership

Due to current case management system constraints, all digital information will be securely retained on our case management system.

When we receive job applications containing personal information we create or update the information we hold about that person on our systems and files. We use the personal information to process the application and to make a decision about the application itself. We will keep the information for a period of 1 year, after which it will be destroyed.

If you have opted-in to receive our marketing communications you can unsubscribe from our data at any time during this period.

Information about the use of our website and the use of cookies is explained on our Site.

## 9. How we keep information secure?

We are under a general duty to keep personal data and information confidential. Where we share information, we take all reasonable steps to keep it secure, use it fairly and ensure that data protection safeguards are in place.

### Cookies

You can set your browser to refuse all or some browser cookies, or to alert you when websites set or access cookies. If you disable or refuse cookies, please note that some parts of this Site may become inaccessible or not function properly.

When someone visits [www.morrisread.co.uk](http://www.morrisread.co.uk) we may use a third party service, Google Analytics, to collect standard internet log information and details of visitor behaviour patterns. We do this to find out things such as the number of visitors to the various parts of the site. This information is only processed in a way which does not identify anyone. We do not make, and do not allow Google to make, any attempt to find out the identities of those visiting our website. If we do want to collect personally identifiable information through our website, we will be up front about this. We will make it clear when we collect personal information and will explain what we intend to do with it.

Our Site may contain links through to third party websites which may also use cookies over which we have no control. We recommend that you check the relevant third party's privacy notice for information about any cookies that may

be used. In addition, if you linked to our website from a third-party site, we cannot be responsible for the privacy policies and practices of the owners and operators of that third party site and recommend that you check the policy of that third party site. You can configure your web browser to refuse cookies, to delete cookies, or to be informed if a cookie is set.

## 10. Your rights

Your rights are as follows:

- a. the right to be informed;
- b. the right of access;
- c. the right to rectification;
- d. the right to erasure;
- e. the right to restrict processing;
- f. the right to object;
- g. the right to data portability; and
- h. the right not to be subject to automated decision-making including profiling.

### The right to be informed

**The right to be informed** is fulfilled by way of this privacy notice and our transparent explanation as to how we use your personal data.

### The right of access

You have the right to obtain a copy of personal data we hold about you, including the reasons why we hold it, who the data will be shared with as well as details of the period for which the data will be retained.

In most instances, we will provide the information to which you are entitled within one month of receipt of a valid request. Requests which are complex or numerous may however take up to three months.

Requests which are considered manifestly unfounded or excessive will be refused.

## The right to rectification

You are entitled to have your records amended if the personal data we hold is inaccurate or incomplete.

## The right to erasure

You have a right to request your data is deleted in certain circumstances, i.e. where it is no longer needed for the purposes it was collected; the (rare) occasions where consent is relied upon as the lawful basis for processing, it is withdrawn and there is no other lawful basis for our continuing to process it; you object to the processing (see below) and there are no overriding legitimate grounds to continue; where the data has been unlawfully processed; or where it has to be erased for compliance with a legal obligation.

## The right to restrict processing

You have the right to limit the way we use your personal data if you are concerned about the accuracy of the data or how it is being used. You can also stop us deleting your data. When processing is restricted, we can store the data but not use it.

## The right to object to processing

You have the right to object to the processing of your personal data in certain circumstances. If the firm agrees to your objection, we must stop using your data for that purpose unless it can provide strong legitimate reasons to continue to use your data despite your objections.

You have an absolute right to object to the firm using your data for direct marketing and once you exercise this objection, the firm must stop using the data.

## The right to data portability

You have the right to ask us to transfer the information you have given to us from one organisation to another or to give that information back to you.

This right will only be applicable if we are processing information based on your consent or under contract and the processing is automated.

## The right not to be subject to decision making based on automated processing

You have the right not to be subject to a decision based solely on automated processing i.e. decisions made entirely by technological means, without human intervention.

This right includes profiling for example any form of automated processing for the purpose of evaluating you as an individual.

We confirm that we do not make decisions based on automated processing as all decisions are made by individual/individuals within the firm.

You also have the right to complain to the Information Commissioners Office if you feel there is a problem with the way we are handling your data. We handle data in accordance with the current regulations and if you would like to discuss your data then please contact us.

## 11. How we provide the information to you?

We usually send a hard copy by post to your residential address or by email. We can make other arrangements in some cases.

## 12. Can you see all the information we hold about you?

Morris Read & Co tries to be as open as it can be in terms of giving people access to their personal information. Individuals can find out if we hold any personal information by making a 'subject access request'. If we do hold information about you, we will:

- give you a description of it;
- tell you why we are holding it;

- tell you who it could be disclosed to; and
- let you have a copy of the information in an intelligible form.

To make a request for any personal information we may hold you need to put the request in writing addressing it to our Data Protection Officer, or writing to us.

If you agree, we will try to deal with your request informally, for example by providing you with the specific information you need over the telephone.

You may not be entitled to see all the information held about you if an exemption applies. Examples of exemptions include information that:

- is about another person
- is subject to legal privilege

If an exemption applies, we will explain which exemption applies and we tell you if we have removed any information from the copy we send you.

## 13. Information Sharing and third parties

We use cloud-based providers who operate within the EU under suitable data protection arrangements and security controls in place in accordance with the requirements in GDPR. We also store hard copy material on site.

We also share data with organisations who perform audit and assurance roles for us and those who provide professional advisory services. This includes legal and other professional advisers.

## 14. Information collected from third parties

Generally, when we do this, it is in the exercise of our regulatory functions, powers and duties, including complainants, other regulatory bodies, law enforcement agencies and witnesses.

## 15. Transferring your personal data out of the EEA

To deliver services to clients and to otherwise operate our business, it is sometimes necessary for us to share personal data outside the European Economic Area (EEA), e.g.:

- with your and our service providers located outside the EEA;
- if you are based outside the EEA;
- where there is an international dimension to the matter in which we are advising you.

These transfers are subject to special rules under data protection laws in the United Kingdom and EEA.

These non-EEA countries do not have the same data protection laws as the United Kingdom and EEA. We will, however, ensure the transfer complies with data protection law and all personal data will be secure. Our standard practice is to use standard data protection contract clauses which have been approved by the European Commission.

If you would like further information please contact our Data Compliance Officer

## 16. Updates to this Privacy Policy

We regularly review and, if appropriate, update this privacy policy from time to time, and as our services and use of personal data evolves. If we want to make use of your personal data in a way that we haven't previously identified, we will contact you to provide information about this and, if necessary, to ask for your consent.

If you wish to withdraw your consent in relation to storage and processing of your personal data, (i.e. "opt out"), please contact us. Please note that, following any such withdrawal, we may not be able to provide the Services to the full extent or at all.

Information about concerns or complaints may be made to the Information Commissioners Office in the UK via [www.ico.org.uk/concerns](http://www.ico.org.uk/concerns). If you have any

queries about this Privacy Policy or wish to resume receiving information which you may have previously opted-out of receiving, please contact us.

This Policy was last updated January 2020.