



Beaufort Montague Harris
SOLICITORS

PRIVACY POLICY

Beaufort Montague Harris respects your privacy and is committed to protecting your personal data.

We are responsible for how your data is processed and this privacy notice will explain to you how we look after your data, your privacy rights and your protection under the law.

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Geraint James – Regulated by The Solicitors Regulation Authority (Firm number 428723)

1. CONTROLLER

Beaufort Montague Harris is the controller of the information that we collect about you (personal data).

Geraint James is our Data Protection Coordinator and we are registered with the UK Commissioners Office (ICO) as a data controller under registration number Z9346282.

2. WHOM TO CONTACT

If you have any concerns in regard to your data, in the first instance please contact our Data Protection Coordinator by telephone on 01225 339329 or by email to enquiries@bmhsolicitors.co.uk.

If we are unable to resolve your concern, you have the right to make a complaint at any time to the Information Commissioner's Office (ICO) which is the UK supervisory authority for data protection issues (www.ico.org.uk).

3. PERSONAL DATA

Personal data is any information that relates to a living, identifiable person. This data can include your name, contact details and other information we gather in the course of our work with you. It can include more what is known as "special categories" of data; for example, religious, political or other beliefs, physical or mental health. The collection and use of these types of data is subject to strict controls. This also applies to information about criminal convictions and offences, which has limitations on the way it can be processed.

Beaufort Montague Harris are committed to protecting your personal data, whether it is "special categories" or not, and we only process data if we need to for a specific purpose.

We mainly collect your data through our contact with you and such data is usually provided by you, but in some instances, we may receive data about you from other people or organisations. This is known as data from third parties and is detailed later in this notice.

4. CONTACTING YOU

We will only send general invitations of updated to you if you have provided your consent for us to do so. If you represent an organization, we may write to you from time to time unless you have told us that you do not wish to receive any further mailings.

Any marketing emails will provide you with the option to opt out of future mailings.

5. NON-PROVISION OF DATA

Where we need to collect personal data by law, or if required under the terms of a contract or agreement we have with you and you do not provide the data when

requested, we may not be able to provide the contract or service and therefore may be unable to act for you. If this is the case, we will notify you at the time.

6. PERSONAL DATA RECEIVED FROM THIRD PARTIES

Our clients, the Courts and other legal professionals may include personal data about individuals that is relevant to a legal matter or case we are working on. This personal data will be treated with the same care that we treat data held about our clients.

Beaufort Montague Harris is committed to protecting all personal data.

7. PROCESSING YOUR DATA TO PROVIDE YOU WITH OUR SERVICES

We process your data to fulfill our responsibilities to you as our client or clients. We detail below some specific purposes for processing your data, and the legal basis for each type of processing, which enables us to provide our services to you:

- Your contact details so that we can share information with you;
- Information that you provide us with to confirm your identity when you instruct us, and to ensure we comply with Anti-Money Laundering Requirements;
- Information detailed in emails and correspondence from you and records of telephone calls or meetings so that we can:
 1. Understand your objectives and requirements;
 2. Provide you with appropriate advice; and
 3. Carry out your instructions.

- Review data which you may choose to provide to us for research purposes; and
- Details of transactions you instruct us to carry out for you and the fulfillment of our services to you so that we can:
 4. Monitor progress in your matter;
 5. Provide you with our service and deliver on your instructions;
 6. Complete financial transactions; and
 7. Prepare and issue invoices and arrange payment with you.

- Details of your preferences if you have asked to be contacted in relation to any events or seminars;
- Information specific to you that we retain on your behalf.

8. LEGAL BASIS FOR PROCESSING

There are three grounds under which Beaufort Montague Harris may process your data to provide you with legal services. These are:

- Processing is required to agree to your requirements enabling us to act for you and deliver the services that we have agreed to provide for you; or
- You have given us your consent for us to process your personal data; or
- It is a legal requirement of the Court or other regulatory bodies to provide information that we hold about you.

The nature of legal work can mean that we will hold special category data that relates to you. Additional grounds for holding such data are:

- When establishing, investigating or defending a legal claim;
- To protect your interests if you are physically or legally incapable of giving consent;
- Where you have provided us with explicit consent to hold and process such data; or
- Where the data we are processing has already been made public by you.

For some processing purposes, we share your data with third parties. Please see the list below of whom we may share with and for what purpose.

9. WHO WE SHARE YOUR DATA WITH

Our IT system providers have access to data to ensure that our systems operate effectively and that we are running up to date software and security.

Financial auditors view data to monitor and confirm that we are complying with statutory and regulatory requirements.

We will share your data with other legal professionals and technical experts when appropriate to ensure we can fulfill the requirements of the service we have agreed to provide for you.

At the end of the period that we store your data we ensure it is destroyed by licensed confidential waste destructors. We obtain and store certificates of destruction.

10. HOW WE STORE YOUR DATA

Your personal data is stored in both hard copy and electronic formats.

Electronic data including emails is stored via our cloud-based storage system. This is with a US based company and all files are protected and encrypted. The storage system is safe, secure and reliable, meeting compliance and privacy needs.

We do not transfer data to other jurisdictions.

11. HOW LONG WE KEEP YOUR DATA

Once your matter is closed, we keep your physical file for 7 years unless you specifically request that we hold for longer, or you ask us to return your file to you. Following this 7-year period, we then securely destroy your file.

This does not apply to Wills and Deeds which are retained indefinitely.

Once the applicable retention period expires, unless we are legally required to keep your data for longer, or there are specific and justifiable reasons why we should keep it, we will securely delete and destroy the data.

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