

## Privacy Notice for Field Agents and Consultants

This privacy notice is provided by Property Solutions Group (South East) Limited and Southey & Co Limited and explains what personal data we collect about you, how and why we collect store, use and share your personal data, your rights in relation to your personal data and how to contact us or make a complaint. By 'personal data', we mean information which relates to you as an individual and tells us something about you. References to 'we', 'us' or 'our' in this privacy notice are references to whichever of Property Solutions Group (South East) Limited and/or Southey & Co Limited to which you provide the Services.

### 1 Personal data we collect about you

The information we collect about you may include:

- Your name and contact details (telephone number, email address, postal address)
- Terms and conditions on which you provide the Services to us
- Information relating to the Services you provide to us
- Bank account details
- Information about your criminal record including a copy of your basic criminal records check from the Disclosure and Barring Service

We will generally collect this information from you. In some cases, we may collect personal data from other individuals or businesses involved in the management or sale of a property.

### 2 How and why we use your personal data

The table below explains what we use your personal data for and our legal basis for doing so:

What we use your personal data for	Our legal basis and condition for processing if applicable
To contact and communicate with you To administer payments	For the performance of our contract with you or to take steps at your request before entering into a contract  For our legitimate interests or those of a third party
To provide information requested by law enforcement or regulatory bodies To check and verify your identity and comply with our professional, legal and regulatory obligations including in relation to money laundering To assess your suitability to provide services to us	To comply with our legal and regulatory obligations  For our legitimate interests or those of a third party in preventing or detecting unlawful acts

What we use your personal data for	Our legal basis and condition for processing if applicable
To communicate with other parties involved in the valuation, property maintenance and sales process	For the performance of our contract with you or to take steps at your request before entering into a contract
For operational reasons, such as maintaining and improving efficiency and training, management of our business, to protect our business interests, physical and information security and maintenance of internal records	For our legitimate interests or those of a third party To comply with our legal and regulatory obligations

### 3 Who we share your personal data with

We routinely share your personal data with:

- Other individuals and organisations involved in the services we provide including executors, solicitors, estate agents, lenders, valuers, surveyors, maintenance contractors, buyers, viewers and sellers.
- Our advisers and service providers including Cloud-based storage providers, IT support providers, telecoms providers, accountants, lawyers, our bank, payment service providers or website hosts.
- Law enforcement agencies and regulatory bodies to comply with our legal and regulatory obligations.
- Potential buyers of some or all of our business or during a restructuring. Usually, information will be anonymised but this may not always be possible, however, the recipient of the information will be bound by confidentiality obligations.
- Any third party to whom we assign or transfer our business.

### 4 Whether information has to be provided by you, and if so why

The provision of your personal data is necessary for us to enter a contract with you to supply the Services and to facilitate payment of your fees. We cannot contract with you without that information.

### 5 How long we keep your personal data for

We keep your personal data for no longer than necessary for the purposes for which it was collected.

Generally this will be for seven years after the end of our relationship with you unless we are required by law to adopt a longer retention period, or we need the information for longer to respond to any questions, complaints or claims made by you or on your behalf.

When it is no longer necessary to retain your personal data, we will anonymise or securely delete it.

## 6 Transferring your personal data outside the UK

We may share your personal data outside the EEA where necessary as part of our provision of our services to customers. We will only do so in accordance with the safeguards imposed or derogations permitted by UK data protection law.

## 7 Your rights

You have the following rights, which you can exercise free of charge.

Access	The right to be provided with a copy of your personal data
Rectification	The right to require us to correct any mistakes in your personal data
To be forgotten	The right to require us to delete your personal data - in certain situations
Restriction of processing	The right to require us to restrict processing of your personal data - in certain circumstances, for example if you contest the accuracy of the data
Data portability	The right to receive the personal data you provided to us, in a structured, commonly used and machine-readable format and/or transmit that data to a third party - in certain situations
To object	The right to object to our continued processing of your personal data, for example processing carried out for the purpose of our legitimate interest.
Not to be subject to automated individual decision making	The right not to be subject to a decision based solely on automated processing (including profiling) that produces legal effects concerning you or similarly significantly affects you.

For further information on each of those rights, including the circumstances in which they apply, please contact us or see the [Guidance from the UK Information Commissioner's Office \(ICO\) on individuals' rights under the UK GDPR](#).

If you would like to exercise any of those rights, please

- email us - for our contact information, see **How to contact us** below
- let us have enough information to identify you
- tell us know what right you want to exercise and the information to which your request relates.

## **8 Keeping your personal data secure**

We have robust security measures in place across all company IT systems to protect your personal data from being accidentally lost or used or accessed unlawfully. These include multi-factor authentication on all our devices, email filtering and managed endpoint protection, physical security measures and staff training. Our staff are all also subject to a duty of confidentiality.

## **9 How to complain**

We hope that we can resolve any query or concern you may raise about our use of your information, see **How to contact us** below.

The UK GDPR gives you the right to lodge a complaint with the Information Commissioner who may be contacted at <https://ico.org.uk/concerns> or by telephone on 0303 123 1113. If you live or work in the EU or EEA, you can also complain to your local supervisory authority.

## **10 Changes to this privacy notice**

We may change this privacy notice from time to time. We will inform you of any changes.

## **11 How to contact us**

Please contact us by email if you have any questions about this privacy notice or the information we hold about you, to exercise a right under data protection law or to make a complaint.

Our email address is [Kirsty.gooch@propertysolutionsgroup.co.uk](mailto:Kirsty.gooch@propertysolutionsgroup.co.uk).