

## Privacy Notice

This Privacy Notice sets out how McConnell Chartered Surveyors Ltd (MCSL) uses and protects any information that you give us.

MCSL is committed to ensuring that your privacy is protected. Should we ask you to provide certain information by which you can be identified, then you can be assured that it will only be used in accordance with this privacy notice.

We may change this policy from time to time by updating this page and you should check this page from time to time to ensure that you are happy with any changes. This Privacy Notice is effective from 1st June 2018.

### Our legal basis for processing your information

We rely upon a number of different legal bases for processing personal information which include:-

- Legitimate interests in order to run our business and to provide the services we have been asked to provide, e.g accounting, managing and auditing our business operation, marketing, fraud, risk assessments, etc.
- Fulfilment of a contract
- Legal obligations required by law.
- Consent - where we process information under consent we will seek your clear and unambiguous consent prior to processing your data. By completing any forms using personal information you are giving us consent to use this information for the purpose it was given.

We only collect information that has been supplied voluntarily, you do not have to provide us with personal information. However, if you do not provide us with information we need in order to fulfil a contract or required by law, we may not be able to offer certain products and services.

### What information we collect and why we collect it

Depending on your relationship with MCSL, we may collect personal information in order to fulfil our obligations with you and to improve our services.

### Website use

We may collect the following personal information when you complete forms within our website:-

- Your name, address, telephone number and e-mail address in order to respond to your requests, property requirements and any queries you make through our website and to provide you with information about MCSL's services.

### Selling or letting a property through us

We may collect the following personal information:-

- Name, address, contact telephone and e-mail address for the purposes of fulfilling our obligations to you in respect of letting or selling your property.
- Photographic ID, utility bill and any other anti-money laundering documentation as required.
- Power of Attorney, Guardianship Order or Grant of Probate, etc, in order to check your ability to sell or let the property should you not be the legal owner.
- Bank details in order to arrange payment of rent due to you.

## **Renting or purchasing a property through us**

We may collect the following personal information:-

- Name, address, contact telephone, e-mail address and any other information required in order to source a property that is suitable for your needs, to complete an acquisition, or, if required, negotiate the purchase / letting of a property on your behalf;
- Collect any other information in order to carry out our duties once a property has been let to you.
- Photographic ID, utility bill and any other anti-money laundering documentation as required.
- Information from credit references agencies for the purposes of the prevention and detection of crime, fraud and/or money laundering and checking your suitability to rent that property.

## **Property Management**

### **Client**

We may collect the following personal information:-

- Name, address, contact telephone number, email address, VAT registration number for the purposes of fulfilling our obligations to you in respect of managing your property.
- Photographic ID, utility bill and any other anti-money laundering documentation as required.
- Bank details in order to arrange payment of rent due to you

### **Tenant**

We may collect the following personal information:-

- Name, address, contact telephone number and e-mail address for the purposes of fulfilling our obligations to our client and to the tenant in managing the property and to chase any debt that may arise.
- Photographic ID, utility bill and any other anti-money laundering documentation as required.
- Where you are the legal owner within a development we manage, we will collect your name and telephone number to get in touch with you in the case of an emergency and also the name and telephone number of the tenant should it be rented.
- To process a payment we will require your bank details, however these will never be written down nor kept in any other form.

## **Professional work**

We may collect the following personal information:-

- Name, address, contact telephone number, e-mail address in order to carry out our obligations to you in respect of undertaking rent review or lease renewal negotiations or preparing a valuation report.
- Photographic ID, utility bill and any other anti-money laundering documentation as required.

## **Ground Rent Department**

We may collect the following personal information

- Name, address, contact number, e-mail address and bank details of the client in order to fulfil our obligations to you.
- Name, alternative address and e-mail address of the tenants in order to send out ground rent demands or receipts.
- To process a payment we will require your bank details, however these will never be written down nor kept in any other form.

## **How we use the personal information**

Including the above we may use your personal information to:

- safeguard the security of our premises and those we maintain for third parties – for example through the use of CCTV and door entry systems
- Internal record keeping

## **Who do we share your information with**

By providing us with your personal information, you have given your consent for us to use your information for the purposes it was given. You can be assured it will be used only to support your customer relationship with us and we will not sell, distribute or lease your personal information to third parties unless we have your permission or we are required under law to do so.

We may share your personal information:-

- With our legal and other professional advisors including auditors, insurance companies and lenders
- With fraud prevention agencies, credit references agencies, banks or building societies and debt collection agencies
- With Courts, to comply with legal requirements or chasing of debts
- With third-party service providers we engage to perform a variety of business operations on our behalf. We will only share the personal information they need in order to perform the services we request, and we contractually require that they protect this information appropriately and not use it for any other purpose.
- With Agents and landlords if you have expressed interest in a property or our management ends.
- With Contractors in order to carry out maintenance on properties.
- If we are under a duty to disclose or share your personal information in order to comply with any legal obligation or governmental request, or in order to enforce or apply our Terms, or to protect our rights, property or safety and for the prevention and detection of crime, fraud and/or money laundering.
- If you are purchasing or renting a property through us or we are undertaking lease renewals, we will share your personal information with our client, your appointed solicitors and the solicitors acting for the other side of the deal as is necessary to facilitate the sale or purchase or to complete the lease renewal.
- Utility companies and Land and Property Services to advise of change of tenant

## **How long to we keep your information**

We will keep information for a reasonable amount of time in order to perform your requests and this will depend on the type of service you have requested from us, however the retention period may be longer than the period for which we are providing services to you where we have a statutory or regulatory obligation to retain personal information for a longer period or where we may need to retain the information in case of a legal claim.

## **Security, storage and transfer of information**

We are committed to ensuring that your information is secure. In order to prevent unauthorised access or disclosure, we have put in place suitable physical, electronic and managerial procedures to safeguard and secure the information we collect online.

We will ensure that your personal information is not damaged, destroyed, or disclosed to a third party without your permission and to prevent unauthorised access to it. The computers that store the information are kept in a secure facility and we use secure firewalls and other measures to restrict electronic access. If we are working with third parties we will require them to have in place similar measures to protect your information.

## International Transfers

We may transfer personal information collected about you to landlords in countries other than the country in which the information was originally collected. Those countries may not have the same data protection laws as the country in which you initially provided the information, however we will take steps to safeguard your personal information in accordance with this Privacy Notice as far as possible.

## Controlling the information we have on you

At any point whilst McConnell Chartered Surveyors is in possession of or processing your personal data, all data subjects have the following rights:

- **Right of access** – you have the right to request a copy of the information that we hold about you under GDPR by contacting us in writing or e-mailing us at [info@mcconnellproperty.com](mailto:info@mcconnellproperty.com).
- **Right of rectification** – you have a right to have any incomplete or inaccurate personal data we hold about you corrected, though we may need to verify the accuracy of the new data you provide us.
- **Right to be forgotten** – in certain circumstances you can ask for the data we hold about you to be erased from our records where there is no lawful basis for us to continue to process it.
- **Right to restriction of processing** – where certain conditions apply you have a right to restrict the processing, eg if you want us to establish the your data's accuracy or where our use of the personal data is unlawful but you do not want us to erase it or where you need us to hold the data even if we no longer require it as you need it to establish, exercise or defend legal claims or you have objected to our use of your personal data but we need to verify whether we have overriding legitimate ground to sue it.
- **Right of portability** – you have the right to have the data we hold about you transferred to another organisation.
- **Right to object** – you have the right to object to certain types of processing such as direct marketing.
- **Right to object to automated processing, including profiling** – we do not make decisions based solely on automated processing, including profiling.

It is important that the personal data we hold about you is accurate and current. Please keep us informed if your personal data changes during your relationship with us.

We may need to request specific information from you to help us confirm your identity and ensure your right to access the information. MCSL will ask either for a copy of your driving licence, passport, birth certificate and a utility bill not older than three months for security purposes. A minimum of one piece of photographic ID listed above and a supporting document is required

## How to complain

If you have any complaints regarding how we are handling your personal information, please contact us directly at the address below or by e-mailing us at [info@mcconnellproperty.com](mailto:info@mcconnellproperty.com). If you are unhappy on how we have dealt with your complaint, you can contact the Information Commissioners Office if applicable