

Privacy Policy

Steeles Law Solicitors Limited (“we”, “us”), is the “data controller” of our clients’ and business contacts’ personal data (which we call “personal information” for clarity). This means that we are responsible for deciding how we hold and use personal information about you. We are required under data protection legislation to notify you of the information contained in this privacy policy.

This privacy policy (which is our “privacy notice” for the purposes of the General Data Protection Regulations), describes the main ways in which we collect and use personal information about you through your use of this website, or contact us by email.

It is important that you read this privacy policy, together with any other privacy policy or fair processing notice we may provide on specific occasions when we are collecting or processing personal information about you, so that you are fully aware of how and why we are using your information; this policy does not, for example, cover data we collect about you when you use our website. This privacy policy supplements the other notices and is not intended to override them.

It is important that you read this notice, so that you are aware of how and why we are using such information.

Collection and use of your information

In the case of our clients and business contacts we typically collect personal information from you directly when you enter your personal information into our website or contact us by email. We receive personal information about you from various third parties. In the course of some instructions we may gather special categories of personal data (such as information about your health) so that we can advise you.

If you are not our client, we may have been passed information about you by one of our clients so that we can advise them. Please see our section about this below.

Enquiries about our services

When contacting us with an enquiry, you provide us with your name, phone number and email address as well as details of the matter about which you would like us to give you advice.

We use the personal information which you have given us in order to respond to your enquiry and, if you would like to instruct us, to set up our file. The use of your personal information in this way is necessary so that we can take steps at your request with a view to entering into a contract with you.

We may also retain your personal information and details of your enquiry for up to 12 months because we have a legitimate interest knowing who has been interested in our business, being able to deal with future enquiries from you and, in some cases, following up on potential business leads.

Complying with anti-money laundering obligations

At the start of an instruction we will usually ask you for evidence of your identity such as a bank statement or utility bill and your passport or driving licence. We retain copies of these documents on file and use the information which we have gathered to verify your identity with third party sources (such as running a “soft” credit check which has no impact on your credit score).

In cases where you are using your own money to buy something (for example, if you are buying a house), we may also ask you for evidence of where that money came from.

The lawful basis for our collection and use of your personal data in this way is our need to comply with our legal obligations (to help combat money laundering) and our legitimate interests in preventing our services from being used to facilitate or aid criminal activity).

Giving advice to you

If you have asked us to advise you, in addition to the information that you tell us when you first contact us, we will likely gather further personal information about you. This information may include details about your issue which you tell us, as well as information given to us by third parties. This may include, for example, information that the other parties to a dispute tell us as well as witness and expert reports and opinions. The lawful basis for our collection and use of your personal information in this way is our ability to perform our contractual obligations to you and our legitimate interest in being able to advise you fully and properly and to carry out our instructions.

In some matters you may also tell us sensitive information about you (sometimes called “special categories” of personal information). You might, for instance, tell us information about an injury you have suffered or a medical condition that you have. In some cases our use of this personal information is necessary for the establishment of legal claims that you might have or to help you defend a legal claim. In some cases we need to use this information to defend ourselves from legal claims (for example, if we have prepared your will we may need to retain medical evidence to show that you had mental capacity to validly make a will).

In other cases, we use these special categories of personal information with your express consent, but only where we ask you for it.

Giving advice about you

In some cases, our clients might give us personal information about you so that we can give advice to our client in the course of their instructions to us. For example, a company which we are advising might give us information about one of their employees. Information that we gather will normally come from our clients or from third parties, but you might also tell us information yourself or through your representatives. The kinds of information we gather will depend on what we are advising about but will likely include details of your identity and contact as well as details of your acts and omissions (including alleged acts and omissions). Our lawful basis for the collection and use of information in this way is our legitimate interest in being able to carry out our clients’ instructions.

In some matters our clients may also tell us sensitive information about you (sometimes called “special categories” of personal information). This might, for example, include information about an injury you have suffered or a medical condition that you have. In some cases our use of this personal information is necessary for the establishment of legal claims that our clients might have or to help our clients defend a legal claim you might bring against them. In some cases we need to use this information to defend ourselves from legal claims (for example, to show that we have advised our clients correctly).

Billing and Payments

If you are our client or if you have agreed to contribute towards a client’s fees, we use your identity and contact information to bill you and to make payments to you. We also use your financial information (such as your bank account details) to take, and make, payments. The collection and use of your personal information for this purpose is necessary for the performance of your contractual obligations to us and so that we can perform our contractual obligations to you.

To comply with our financial, legal and accounting obligations we retain details of invoices and payments made and received for up to seven years. Our retention and use of this information is necessary so that we can comply with our legal obligations and also because we have a legitimate interest in being able to respond to queries and disputes about invoices and payments.

Payments to people who are not our clients

In the course of carrying out our clients’ instructions we may need to make a payment to you. We use your identity, contact and financial information (such as bank account details) to make these

payments. We have a legitimate interest in collecting and using this personal information so that we can comply with our clients' instructions.

To comply with our financial, legal and accounting obligations we retain details of invoices and payments made and received for up to seven years. Our retention and use of this information is necessary so that we can comply with our legal obligations and also because we have a legitimate interest in being able to respond to queries and disputes about payments.

Retaining your personal data after we have finished giving advice

We will retain your personal information for as long as necessary in order to carry out your instructions.

At the end of our instructions we will retain personal information about you on our files. In most cases, we will retain our file for 6 years after the end of our instructions as this is the period during which most clients can bring a claim against us if they think our advice has been negligent (this is called the "limitation period"). In some cases, where we think that the limitation period may be longer we will retain the file, and the personal information contained within it, for more than 6 years.

The lawful basis of our collection and use of your personal information is our legitimate interests in being able to respond to queries, dealing with complaints (including defending ourselves in any legal proceedings), and being able to demonstrate that we have complied with our legal and professional obligations.

Where we hold your personal information to administer any estate or trust of which we are, or any of our directors is, an executor or trustee, we will retain and use your personal information for as long as necessary in order to carry out our obligations to administer such trusts. We will keep details of the beneficiaries for up to 6 years after we have ceased to administer the estate or the trust. This is necessary in order for us to show that we have administered the estate correctly.

Where we have prepared your Will, we will keep details of your instructions, the circumstances surrounding the creation of your Will, and our advice for the duration of your lifetime and for a period of up to 6 years after your estate has been distributed. This is necessary in case there is ever a dispute about the validity of your Will and/or the distribution of your estate.

Ensuring a high quality practice

In order to ensure that our practice is run to a high standard, we participate in the Lexcel accreditation scheme. This involves a third party, who is under a contractual duty of confidentiality, randomly selecting files and carrying out an audit to ensure that those files meet certain standards. This process will involve a third party having access to any personal data in your file. We will not make your file available for audit if you ask us not to.

The lawful basis for our disclosure of your personal data to the Lexcel auditor is our legitimate interest in ensuring that our practice is run efficiently and to a high standard.

Newsletters

If you have not bought anything from us you can sign up to receive our newsletters and marketing emails. If you wish to sign up to receive our email newsletter, we ask for your name, email address, employer and details of why you are interested in us. We need this information in order to send the newsletter to you and so we can understand why you want to hear from us. Our lawful basis for using your personal information in this way is your express consent.

When signing up to our newsletters, we also ask you whether you wish to receive newsletters and other offers from specific third parties whose services might be of interest to you. If you agree to this, we will pass your details to those third parties who will contact you directly. Our lawful basis for passing your contact details to third parties is your express consent.

If you have not signed up to receive our newsletter, but have instructed us (or discussed the possibility of instructing us), we may also send our email newsletter and other marketing emails to you if you have not opted-out of receiving it. Our lawful basis for using your personal information in this way is our legitimate interest in sending you news and information about offers we think you may be interested in so that we can grow our business.

You are free to opt-out of receiving our newsletter and marketing emails at any time by contacting us or by clicking the link at the bottom of any newsletter or marketing email from us.

Business to Business marketing

We have a legitimate interest in using the personal information that we have gathered from our contact with you in order to build a list of business or commercial contacts and/or to gain insight into who is interested in our products and services to grow our business.

In some cases, we may use your personal information to send you marketing emails or information about our commercial offers which we think might be of interest to you. In compliance with the Privacy and Electronic Communications Regulations (“PECR”), we will only send you marketing emails in this way without your consent if you are not an “individual subscriber” within the meaning of PECR (we might, for example, contact you in this way if you are an employee of a limited company).

If you are a consumer, sole trader or member of a partnership (or an employee of any business which trades in these ways), we do not use your personal information to send you marketing messages by email, unless you have provided your express consent for us to do so.

You have the right to opt-out of receiving marketing emails and can do so at any time by clicking the unsubscribe link in such emails or by contacting us.

We will obtain your express opt-in consent before we share your personal data with any third party for marketing purposes.

Keeping you informed about changes

If you receive marketing emails or information about commercial offers from us, we may use your identity and contact details to contact you periodically to keep you updated about changes to our website, our policies or the terms of use.

We use your personal information in this way to allow us to comply with legal obligations (when changes to the law require changes to our terms), and for our legitimate interests to keep our records updated.

Obtaining Consent and providing us with information we need

In most cases we do not require your consent to use your personal information. Details of the lawful basis of our use of your personal information are set out above.

In some circumstances, we may approach you for your specific written consent to allow us to process certain personal information for a specific purpose. If we do so, we will provide you with full details of the information that we would like and the reason we need it, so that you can carefully consider whether you wish to consent.

If you fail to provide certain information when requested, we may not be able to perform our obligations to you or to send you information that you would like to receive from us (such as newsletters).

This may mean that we refuse to enter into or cancel any contract between us, or refuse to provide you with a service that you would like us to provide.

Data Sharing and Transfer

We may share your personal information with third parties where required by law, to parties who are under contract to provide services to us (our “data processors”) where the use of your personal information forms part of their contractual duties, or where you give us consent to do so. We will always act in accordance with our professional obligations of confidentiality.

We do not transfer your personal information to third parties outside the United Kingdom or the European Economic Area (EEA) without your consent in the course of any activities set out in this privacy policy. In some limited cases we may transfer your personal data outside the EEA but we will tell you about these in a separate privacy notice if this is likely.

Data security

We have put in place appropriate security measures to prevent your personal information from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed. In addition, we have a policy to limit access to your personal information to those employees, agents, contractors and other third parties who have a legitimate reason to receive it. They will only process your personal information on our instructions and they are subject to a duty of confidentiality.

We have put in place procedures to deal with any suspected data security breach and will notify you and any applicable regulator of a suspected breach where we are legally required to do so.

Retaining Information

We will only retain your personal information for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, accounting, or reporting requirements.

Where possible we have set out above the periods for which we retain certain kinds of personal information. Otherwise, to determine the appropriate retention period for personal information, we consider the amount, nature, and sensitivity, the potential risk of harm from unauthorised use or disclosure, the purposes for which we use your personal information and whether we can achieve those purposes through other means, and the applicable legal requirements.

Automated decision-making

We do not anticipate that any decisions will be taken about you using automated means.

Your rights in connection with personal information

Under certain circumstances, by law, you have the right to:

- Request access to your personal information (commonly known as a "data subject access request"). This enables you to receive a copy of the personal information we hold about you and to check that we are lawfully processing it.
- Request correction of the personal information that we hold about you. This enables you to have any incomplete or inaccurate information we hold about you corrected.
- Request the erasure of your personal information. This enables you to ask us to delete or remove personal information where there is no good reason for us continuing to process it. You also have the right to ask us to stop processing personal information where we are relying on a legitimate interest and there is something about your particular situation which makes you want to object to processing on this ground.
- Request the restriction of processing of your personal information. This enables you to ask us to suspend the processing of personal information about you, for example, if you want us to establish its accuracy or the reason for processing it.

- Request the transfer of your personal information to another party (in some circumstances and where this is technically possible).

Please note that these rights only apply to the extent that we act as a data controller. In some cases we may be acting as a data processor, in which case we will refer your request to the data controller who will then tell us how they would like us to proceed.

Even if we are acting as a data controller, because of the nature of our work, we can decline to act on your request if an exemption applies. This is particularly likely to apply where a person who is not our client makes a request to exercise their rights.

If you want to exercise these rights, please contact us. We may ask you for further information to help us deal with your request or to help us verify your identity.

Your right to withdraw consent

In cases where we have asked for consent and you have given us consent to use your personal information for a specific purpose (such as opting-in to receiving marketing emails), you have the right to withdraw your consent for that specific processing at any time. To withdraw your consent, please contact us.

Once we have received notification that you have withdrawn your consent, we will no longer process your information for the purpose or purposes you originally agreed to, unless we have another legitimate basis for doing so. Your withdrawal of consent does not affect the lawfulness of our use of your personal information up to the time that you let us know that you have withdrawn your consent.

Changes to this privacy policy

We reserve the right to update this privacy policy at any time, and we will provide you with a new privacy policy when we make any substantial updates. We may also notify you in other ways from time to time about the processing of your personal information. This version was last updated on 13 June 2019 and historic versions can be obtained by contacting us.

Contacting us

If you want to exercise your rights, or if you wish to make a complaint about how we have handled your personal data, please contact our Data Protection Officer, Robert Hickford (Director) by email at dataprotection@steeleslaw.co.uk or by post at Lawrence House, 5 St Andrews Hill, Norwich, NR2 1AD. Please mark all post 'Data Protection'.

You also have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK supervisory authority for data protection issues. Contact details for the ICO can be found at www.ico.org.uk.