

ROBERTSHAWS CHARTERED SURVEYORS PRIVACY POLICY YOUR INFORMATION AND HOW WE USE IT

This Privacy Notice explains how we process personal data you have provided us with, how we collect, hold and use it, in order for us to provide you with a professional service.

Please read carefully to understand why data is collected and how we use it.

We may change the privacy policy from time to time, by amending this document.

INFORMATION APPLICABLE TO ALL CLIENTS

Company Information

Robertshaws Chartered Surveyors, Parva House, 335C Wakefield Road, Denby Dale, Huddersfield, HD8 8RF.

The Data Controller is Mrs E A Robertshaw MRICS, who is a Sole Practitioner.

We are Members of the Property Ombudsman (TPO). We abide by the TPO code of conduct and Redress is provided through them. Non-property matters are covered by the Centre for Effective Dispute Resolution (CEDR).

Our website www.robertshaws.com does not collect or store information about users and does not place cookies on your system.

We do not have a mailing list and do not store information for marketing purposes.

Your Rights

- The right to be informed about collection and use of personal data.
- Right to request access to data held
- Right to request correction of data held.
- Right to request removal of data held. Note this may not always be possible due to legal reasons.
- Right to restrict or prevent processing of personal data.
- Right to withdraw consent for use of personal data. If you withdraw consent, we may not be able to provide certain products or services to you.
- Right to request transfer of personal data held.

Data Retention

We will retain your personal information for as long as is necessary to comply with any legal, accounting or other reporting requirements. This may be different periods, depending on the service you have chosen to use. Please note by law we are required to keep basic information about clients for 6 years after they cease being customers, for tax purposes.

Complaints

If you have any questions or complaints about how we handle your data, you can contact us by e-mail at lizrobertshaw@robertshaws.com or by phone on 01484 866368. We will do our best to address your concerns. You have the right to lodge a complaint with the Information Commissioner's Office. See www.ico.org.uk.

BUSINESS CLIENTS - YOUR INFORMATION AND HOW WE USE IT

As part of our service to you, we have to hold personal information about you.

We hold, name, address and passport details (Proof of ID). This is done to meet our obligations under the Anti-Money Laundering Regulations. This information is held in a file in the office, in a locked cabinet in an office protected by CCTV and an alarm.

We do not usually hold bank account details.

In addition, we hold phone numbers and e-mail addresses to contact you, and all our office staff have access to these numbers.

Information will not be passed on to third parties e.g. acquiring authority, Landlords Agent or other parties involved in a case, unless you inform us we can.

In sales – information has to be passed on to a purchasers solicitors and the purchaser, but we will only pass information that needs to be passed on.

In addition, we have to pass on relevant information for a case such as wayleaves.

Our computer system is all password protected and we update our anti-virus software regularly.

If you have any specific requests about how we deal with your data, please make that request in writing for us to action it and have an appropriate record. Please bear in mind that if we do not have this consent we may not be able to carry out your instructions properly.

GENERAL CLIENTS - YOUR INFORMATION AND HOW WE USE IT

As part of our service to you, we have to hold personal information about you.

We hold, name, address and passport details (Proof of ID). This is done to meet our obligations under the Anti-Money Laundering Regulations. This information is held in a file in the office, in a locked cabinet in an office protected by CCTV and an alarm.

We may hold your bank account details for payments of rent or compensation issues, as applicable. This information is inputted onto our bank system on the computer, which is password protected and protected by anti-virus/anti-spamware software, updated regularly. We do not keep bank information on paper files. We never share this information with anyone.

If we do not hold bank account details, we will issue cheques.

If we are dealing with tenancy matters, your name and address have to go on a tenancy agreement, it is a legal requirement. We do not hand out phone numbers, unless you specifically ask us to pass them on to a third party.

If we are required to deal with solicitors on your behalf, then we will pass on your details to the solicitor you ask us to work with.

If we have to advertise your property as part of your instruction, we will have to share information about that property via paper advert, via our website and via our chosen property portal. We will discuss this with you and your instructions will be accepted verbally, but then confirmed in writing.

We may have to provide limited information to the local authority and utility providers in some cases.

If you have any specific requests about how we deal with your data, please make that request in writing for us to action it and have an appropriate record. Please bear in mind that if we do not have this consent we may not be able to carry out your instructions properly.

LANDLORDS – YOUR INFORMATION AND HOW WE USE IT

As part of our service to you, we have to hold personal information about you.

We hold, name, address and passport details (Proof of ID). This is done to meet our obligations under the Anti-Money Laundering Regulations. This information is held in a file in the office, in a locked cabinet in an office protected by CCTV and an alarm.

Your name and address has to be on the Tenancy Agreement, by law and so we have to share that information with tenants.

In addition, we hold phone numbers to contact you and all our office staff have access to these numbers. We do not give your numbers to tenants or contractors, unless you specifically ask us to. We will provide limited information to the Local Authority for Council Tax purposes and to utility providers.

Your bank account information is on our banking system, to enable payment of rent. We do not share this information with anyone.

By law we have to provide information annually to HMRC regarding landlords, their properties and rents received. This is done in Excel format.

We also have to have authority to advertise your property. This is provided via the Confirmation of Instructions Form you complete when asking us to work on your behalf.

Our computer system is all password protected and we update our anti-virus software regularly.

If you have any specific requests about how we deal with your data, please make that request in writing for us to action it and have an appropriate record. Please bear in mind that if we do not have this consent we may not be able to carry out your instructions properly.

TENANTS – YOUR INFORMATION AND HOW WE USE IT

When you request to view a property we need certain personal information to be able to organise the viewing, this information will only be shared with our viewer and client.

If you apply for a property, you will need to complete a Tenancy Application Form as part of your application. This will require personal data, which is vital for your application to proceed. This information is passed on to a third party company – Rentshield Direct, who use this information to check your financial status and run other checks. Once these checks have completed, if you are not offered a tenancy, your information will be destroyed.

If you are offered a tenancy – Your information will stay on file. We will use your e-mail and phone numbers during the course of your tenancy to contact you about any issues and about inspections. We do not use any other information you have given us.

We will need to hold copies of photographic ID and proof of address ID. This is done to meet our obligations under the Immigration Act and Anti-Money Laundering Regulations.

Your Bond will be protected by TDS (Tenancy Deposit Scheme). Your name, address and contact details will be passed to them. You will receive a certificate at the start of the tenancy, which shows what details are held by TDS.

In particular, you should note we may need to pass phone numbers to trusted contractors to arrange access for repairs. We may also pass these numbers to Landlords, who may do

some repairs themselves. We will tell you the contractor concerned, when the repair is reported.

We also pass new tenant information on to Tenant Shop, so they can contact you about utility suppliers and broadband etc. As part of the application process, you will receive a form where you can opt in or opt out if you do not want to be contacted by them. This arrangement with Tenant Shop gives us a small commission, should you arrange a contract with them.

Our Tenant Data is kept on a file (paper record) which is in our office in a locked cabinet. The office is protected by CCTV and an alarm.

Some information is also kept on our computer system, which is password protected and security is updated regularly.

At the end of the tenancy - Your file is retained for 6 years before being destroyed. Your application form can be destroyed at the end of the tenancy, if you request this. Please note, we are also required to keep your information under Right to Rent Legislation for 1 year.

If you have any concerns about your information, please speak to us. Any formal requests to remove information should be made in writing. Please bear in mind that if we do not have your consent we may not be able to process your application. We also may not be able to delete your information for legal reasons.