

Privacy Notice



This privacy notice explains how Serjeant & Son ('we') uses any personal information we collect about you.

What information do we collect about you and why?

Serjeant & Son collects and uses personal data on the basis that it is in its legitimate interests to do so, for example to keep records of transactions and to provide a service to its customers.

From our website: we collect information you provide by filling in one of our online enquiry forms, and we may use this to keep you updated about Serjeant & Son's activities and services. You may withdraw this consent at any time by emailing us at legal@serjeantandson.co.uk or writing to us using the information at the end of this notice.

From our clients: we collect information when you first instruct us or make an enquiry and throughout our relationship with you in order to comply with regulation and for the purpose of performing our contract with you. The provision of your personal data is required in order to enter into a contract with us, however the provision of information for marketing purposes is voluntary. We may record and monitor phone calls made to or by us in order to comply with regulatory obligations and for record purposes.

How long do we keep this information?

If you are not a client of ours, we will keep your information for a year after we last heard from you. If you ask us to remove you from our marketing list, we may keep your personal details on an "opted-out" list in order to ensure that we do not market to you again.

If you are or were a Serjeant & Son client, we keep most of your information for 7 years after closure of your file. Where required by law or regulation, we keep documents indefinitely and recordings of telephone conversations with you for 5 years after they took place. In cases such as criminal matters documentation can be kept indefinitely or matrimonial matters kept until the last dependant has reached 18 years of age. Electronic information/files can be retained indefinitely.

Who do we share your information with?

- Our IT providers and services providers in order to provide and maintain the provision of our services;
- Our appointed auditors, accountants, lawyers and other professional advisors, to the extent that they require access to the information to provide advice;
- Fraud prevention agencies and other organisations to allow us to undertake the relevant checks;
- Providers of investments or services we recommend. We may also be required to share information with the auditors appointed by the providers of such products or services;
- The Solicitors Regulation Authority, the Law Society, or any relevant regulatory authority where they are entitled to require disclosure;
- If required to do so to meet applicable law, the order of a Court or market rules and codes of practice applicable to the circumstances at the time;
- Relevant authorities to investigate or prevent fraud or activities believed to be illegal or otherwise in breach of applicable law;

- If tax regulations require us to collect information about tax residency, then in certain circumstances (including if we do not receive a valid self-certification from you), we may be obliged to share information about you with the relevant tax, payments and customs authority, who may pass this on to tax authorities in other jurisdictions;
- In the event that we are involved in the sale or purchase of any business or assets, in which case we will disclose your personal information to the prospective seller or buyer of such business or assets; or
- If Serjeant & Son's assets are acquired by a third party, in which case personal information held by it about its clients may be one of the transferred assets.

We will not lend or sell your information to third parties.

Your personal information may need to be shared with our service providers, which may involve transferring it to countries outside the European Economic Area (EEA). Where we do so, we will ensure that we do this in accordance with current data protection legislation by only transferring your data to jurisdictions in respect of which there is a European Commission adequacy decision or, where this is not the case, by using model clauses which have been approved by the European Commission.

Marketing

If you agree, we may send you information about our products and services by email which may be of interest to you. Where it is in our legitimate interests, we may send you information about our products and services by post. If you have consented to receive marketing, you may still opt out at a later date. We may also use your name and address to post to you invitations to events, or to introduce you to other Serjeant & Son products or services which may reasonably be considered to be of interest to you.

You have a right at any time to stop us from contacting you for marketing purposes. If you no longer wish to be contacted for marketing purposes, please email us at legal@serjeantandson.co.uk or write to us using the information at the end of this notice.

Your rights

You have certain rights in respect of the data we hold relating to you. Details of these rights can also be found on the Information Commissioner's website. You are entitled to a copy of the information we hold about you in a portable format or otherwise, to request rectification, erasure, or restriction of processing of the information we hold about you, and to object to processing or to automated decision making. Please note that the application of these rights varies according to the legal basis used to process your data. In certain circumstances we are required to retain copies of information we hold about you by other regulations. In this instance we will not be able to erase or modify the data.

In order to exercise these rights or if you have any concerns about our use of your personal information, please contact the Data Protection Officer using the information at the end of this notice. You can also contact the SRA in its capacity as Serjeant & Son's supervisory body.

We will endeavour to keep your information accurate however if at any time after giving us this information it becomes out of date, then we ask you to notify us directly and we shall remove or amend the information within a reasonable time frame and in accordance with legislation requirements.

The firm's Data Protection Officer is Wanda Szczygiel a Partner of the firm. If you have concerns regarding your personal information this can be discussed with the fee earner dealing with the transaction, however if the concern is regarding the fee earner dealing with the matter or you wish to raise the matter higher please contact Wanda Szczygiel on the office phone line or by e-mail to wanda@serjeantandson.co.uk.

Security

Internet communication, which includes email, is not secure. The protection of data by encryption is possible provided that the encryption method (protocol) used is current and the correct procedures for encryption and decryption is followed at all times. We cannot accept any responsibility for unauthorised access by a third party or for the loss, theft or modification of data while it is being sent to us by email. For security purposes we may monitor emails received or issued by us.

Our website

Our website may contain links to other websites. This privacy notice only applies to our website. When you use a link to another website you should read the privacy policy of that site.

Changes to our Privacy Notice

We keep our privacy notice under regular review. This privacy notice was last updated in May 2018. We reserve the right to update this privacy notice at any time and we will advise you when we make any substantial update to it.

How to contact us

If you have any questions about our privacy notice or the information we hold about you please contact us at legal@serjeantandson.co.uk or by post at the address below:

Serjeant & Son Solicitors
3-5 Great Whyte
Ramsey
Huntingdon
Cambridgeshire
PE26 1HE