



Privacy Notice

This privacy notice explains how we use any personal information we collect about you.

What information do we collect about you?

We collect information about you when you engage with us for legal services and advice. This information will relate to your personal and financial circumstances, if this is necessary for the provision of our services.

We may collect information when you voluntarily complete client surveys or provide feedback to us.

Information relating to usage of website is collected using cookies. These are text files placed on your computer to collect standard internet log information and visitor behaviour information. We will use your information collected from the website to personalise your repeat visits to the site.

Information about connected individuals

We may need to gather personal information about your close family members and dependents to provide our service to you effectively. In such cases it will be your responsibility to ensure that you have consent of the people concerned to pass their information on to us. We will provide a copy of this privacy notice to them, or where appropriate, ask you to pass the privacy information to them.

Why do we need to collect and use your personal data?

The primary legal basis that we intend to use for processing of your data is for the performance of our retainer with you. The information we collect about you is essential for us to be able to carry out the services that you require from us effectively. Without collecting your personal data we would also be unable to fulfil our legal and regulatory obligations.

How will we use the information about you?

We collect information about you in order to provide you with the services for which you engage us.

Who might we share your information with?

If you agree, we may email you about other products or services that we think may be of interest to you.

We won't share your information for marketing purposes with other companies.

In order to deliver our services to you effectively we may send you details to third parties such as those that we engage for professional compliance, legal services and our obligations with the Legal Aid Agency and Lexcel.

Where third parties are involved in processing your data we will have a contract in place with them to ensure that the nature and purpose of processing is clear, that they are subject to a duty of confidence in processing your data and that they'll only act in accordance within our written instructions.

Where it is necessary for your personal data to be forwarded to a third party we'll use the appropriate security measures to protect your personal data in transit. These include using secure and email encryption.

To fulfil our obligations in respect of prevention of money laundering and other financial crime, we may send your details to third parties if deemed necessary.

How long do we keep your information for?

During the course of our relationship with you will retain personal data which is necessary to provide services to you. We will take all reasonable steps to keep your personal data up to date throughout our professional relationship.

We will keep your file of papers for a period of six years. After this time they will be confidentially destroyed. You may request your papers during this period but please be aware that we will need a short period in which to recover your file and we reserve the right to charge a reasonable administration fee for this where necessary.

How can I access the information you hold about me?

You have a right to request a copy of the information that we hold about you. If you would like a copy of some or all of your personal information please write to us using the contact details below.

We have an obligation to make sure that the personal information held about you is accurate and up to date.

Please ask us to correct or remove any information that you think is incorrect.

Marketing

We would like to send to your information about our products and services which may be of interest to you. If you've agreed to receive marketing information, you may opt out at a later date.

Cookies

We use cookies to track visitor use of website and to compile statistical reports on website activity.

For further information visit <http://www.allaboutcookies.org/>

You can set your browser not to accept cookies and the above website tells you how to remove cookies from your browser. However in some circumstances our website may not function properly as a result.

What can you do if you are unhappy with how your personal data is processed

You also have a right to lodge a complaint with the supervisory authority for data protection.

In the UK this is:

Information Commissioners Office
Wycliffe House
Water Lane
Wilmslow
Cheshire

SK9 5AF

Changes to our privacy

We keep our privacy policy under regular review and we'll inform you of any changes when they occur.

This privacy policy was last updated 1 May 2024.

How to contact us:

Please contact the Data Protection Officer, Robert Welsh, if you have any questions about our privacy policy or information we hold about you by writing to us at:

FAO Robert Welsh
Instalaw Solicitors
Office 15,
Lymedale Business Centre,
Hooters Hall Road,
Newcastle-under-Lyme,
Staffordshire,
ST5 9QF

Protecting your personal information

- To provide our services properly we will need to collect information about your personal and financial circumstances. We take your privacy seriously and will only use your personal information to deliver our services.

- Processing of your personal data is necessary for the performance of our contract for services with you and in meeting our obligations to prevent money laundering.
- We adopt a transparent approach to the processing of your personal data. Sometimes, we may need to pass your personal information to other organisations, including but not limited to the Legal Aid Agency, Solicitors Regulations Authority and Lexcel.
- We may engage the services of third party providers of professional services in order to enhance the service we provide to you. These parties may also need to process your personal data in the performance of their contract with us. Your personal information may be electronically transferred (e.g. by email or over the internet) and we, or any relevant third party may contact you in the future by what we believe to be the most appropriate means of communication at the time.
- The organisation to whom we may pass your details also have their own obligations to deal with your personal information appropriately.
- We will issue you with our privacy notice. This is a separate document which provides more information about the nature of our personal data processing activities and includes details of our retention and deletion policies as well as your rights of access to the personal information we hold about you.
- As part of this agreement we will ask you to consent to the transfer of personal information in accordance with the protections outlined above.
- **Special Categories of personal data:** there are certain categories of personal data that are sensitive by nature. The categories include: data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership and data concerning health. Depending on the nature of the products and services that you engage us for we need to obtain your sensitive personal data but only should it be absolutely necessary.
- If you are concerned about any aspect of our privacy arrangements, please speak to us.