

## **General Privacy Notice**

### **Introduction**

Welcome to RDP Law's privacy notice.

RDP Law respects your privacy and we are committed to protecting your personal data. This privacy notice will inform you how we will look after your personal data when / if:

- you visit our website or social media;
- you visit our office premises;
- we are instructed in a matter;
- we hold your will, powers of attorney, deeds or other important documents;
- you apply for a job with RDP Law;
- you supply RDP Law with services or goods; and
- we come into possession of your personal data for any other reason.

This privacy notice will also tell you about your privacy rights and how the law protects you.

Please use the Glossary (at the end of this document) to understand the meaning of some of the terms used in this privacy notice.

Please note that our website is not intended for children.

### **1. Important information and who we are**

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

#### **Controller**

RDP Law Limited is the controller and responsible for your personal data (collectively referred to as "**RDP Law**", "**we**", "**us**" or "**our**" in this privacy notice). RDP Law Limited includes any director, shareholder, partner, employee or locum, consultant or temporary member of staff who may work with us from time to time.

We have appointed a data privacy manager (**DPM**) who will oversee questions in relation to this privacy notice. If you have any questions about this privacy notice, including any requests to exercise your legal rights (which are explained below), you may contact our DPM using the details set out below:

### **Contact details**

Contact details for RDP Law:	RDP Law, Wentwood House, Langstone Business Village, Priory Drive, Newport, South Wales, NP18 2HD Telephone: +44 (0) 1633 413 500
Contact details for our DPM	Email: <a href="mailto:sioned.thomas@rdplaw.co.uk">sioned.thomas@rdplaw.co.uk</a>

We also have a complaints procedure on our website should you have any complaints in relation to your data. Please see the client area on our [website](#) for more details.

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 ([www.ico.org.uk](http://www.ico.org.uk)). We would, however, appreciate the chance to deal with your concerns before you approach the ICO so please contact us in the first instance.

### **Personal data about other people which you provide to us**

If you provide personal data to us about someone else (such as your directors, employees, someone with whom you have business dealings, or a beneficiary in your will) you must ensure you are entitled to disclose that personal data to us and that, without our taking any further steps, we may collect, use and disclose that personal data as described in this privacy notice.

You must ensure the individual concerned is aware of the various matters detailed in this privacy notice, as those matters relate to that individual. Specifically, you should ensure the individual is aware of our identity, how to contact us, our purposes of collection, our disclosure practices (including disclosure to overseas recipients), the individual's right to obtain access to the personal data and make complaints about the handling of the personal data, and the consequences if the personal data is not provided (such as our inability to provide services).

### **Changes to the privacy notice and your duty to inform us of changes**

We keep our privacy notice under regular review. This version was last updated in August 2023.

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.

### **Third party links**

Our website may include links to third-party websites, plug-ins and applications. Clicking on those links or enabling those connections may allow third parties to collect or share data about you. We do not control these third-party websites and are not responsible for their privacy statements. When you leave our website, we encourage you to read the privacy notice of every website you visit.

## **2. The data we collect about you**

Personal data, or personal information, means any information about an individual from which that person can be identified. It does not include data where the identity has been removed (anonymous data).

“Special categories” of particularly sensitive personal information require higher levels of protection. We may need to be able to collect, store and use this type of personal information for the legal services we provide.

We may collect, use, store and transfer different kinds of personal data about you which we have grouped together as follows:

- **Identity Data** includes first name, maiden name, last name, job title, marital status, title, date of birth and gender.
- **Contact Data** includes postal address (including home, business and billing addresses), email address, telephone and fax numbers.
- **Financial Data** includes bank account and payment card details and other data necessary for fraud prevention and other related billing information.
- **Transaction Data** includes details about payments to and from you and details of services that you have purchased from us.
- **Instruction Data** includes business information necessarily processed in a project or client contractual relationship with us or voluntarily provided by you, such as instructions given, payments made, requests and retainer information.
- **Third Party Data** includes information that you provide to us during the course of any instruction that relates to third parties that you are connected to (as per the statement above, this information may also be Personal Data relating to those third parties).
- **Technical Data** includes internet protocol (IP) address, browser type and version, time zone setting and location, browser plug-in types and versions, operating system and platform, and other technology on the devices you use to access our website.
- **Usage Data** includes information about how and when you use our website and services and visits to our offices.
- **Communications Data** includes your preferences in receiving information from us and your communication preferences.
- **Special Category Data** means personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, data concerning health, data concerning sex life or sexual orientation. Although under the GDPR information relating to criminal offences and convictions is not included within the definition of special category data, for the purposes of this privacy notice we include reference to criminal convictions and offences under the category of “Special Category Data”.

- **CCTV Data** includes data captured by CCTV cameras where we are the controller of the CCTV system.

We also collect, use and share **Aggregated Data** such as statistical or demographic data for any purpose. Aggregated Data could be derived from your personal data but is not considered personal data in law as this data will **not** directly or indirectly reveal your identity. For example, we may aggregate your Usage Data to calculate the percentage of users accessing a specific website feature. However, if we combine or connect Aggregated Data with your personal data so that it can directly or indirectly identify you, we treat the combined data as personal data which will be used in accordance with this privacy notice.

### **If you fail to provide personal data**

Where we need to collect personal data by law, or under the terms of a contract we have with you, and you fail to provide that data when requested, we may not be able to perform the contract we have or are trying to enter into with you (for example, to provide you with legal advice and assistance). In this case, we may not be able to act for you but we will notify you if this is the case at the time.

### **3. How is your personal data collected?**

We use different methods to collect data from and about you including through:

- **Direct interactions.** You may give us your Identity, Contact, Financial, Transaction, Instruction, Third Party, Usage, Communications, Special Category and / or CCTV Data by filling in forms or by corresponding with us in person, by post, by phone or email, corresponding with us through our website, our social media accounts or when you visit our office premises. This includes personal data you provide when you:
  - ask about our services;
  - instruct us on a matter;
  - interact on our website or social media accounts (you should not send us confidential or sensitive information via our website or social media accounts as they are not designed for this purpose);
  - register to attend / attend an event that we are organising;
  - give us feedback or contact us;
  - apply for a position with us;
  - provide us with goods or services; or
  - provide us with your personal data in connection with a matter on which we are instructed but where you are not our client (for example, although not our client, you may be a beneficiary under a Will and so provide us with your personal data in connection with the probate matter in which we are acting).

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- **Indirect interactions.** We may receive your Identity, Contact, Financial, Transaction, Instruction, Third Party, Communications, Special Category Data by;
  - you advising others that you are instructing us to act for you, such as estate agents, surveyors, other law firms etc.; or
  - our clients or third parties in relation to a matter on which we are instructed.
- **Automated technologies or interactions.** As you interact with our website, we will automatically collect Technical and Usage Data about your equipment, browsing actions and patterns. We collect this personal data by using cookies, server logs and other similar technologies. Please see the cookie policy on our website for further details.
- **Third parties or publicly available sources.** We will receive personal data about you from various third parties and public sources as set out below:

<b>Category of Third Party</b>	<b>Data Collected</b>
Analytics and search information providers.	Technical and Usage Data
Providers of technical and payment services such as banks.	Identity, Contact, Financial and Transaction Data
Publicly available sources such as Companies House, the Electoral Register and HM Land Registry.	Identity and Contact Data
Providers of identity and credit check services.	Identity, Contact, Financial and Special Category Data
Other lawyers, litigants in person, courts and regulators who may be connected to the matter that we are instructed to advise on.	Identity, Contact, Instruction and Special Category Data
Experts and witnesses instructed in connection with or involved in a matter on which we are instructed to advise.	Identity, Contact Data, Instruction and Special Category Data together with any other Personal Data relevant to the matter
Public bodies such as HM Courts & Tribunal Services, the Probate Registry, the Department for Work and Pensions, the Office of the Public Guardian, Local Authorities and Health boards who may be connected to the matter that we are instructed to advise on.	Identity, Contact, Instruction and Special Category Data

Our clients may provide us with information about third parties relating to a matter on which we are instructed to advise.	Identity, Contact and Third Party Data
Lender panels, who may provide instructions and documents to us on behalf of your lender where the matter involves a mortgage.	Identity, Contact and Instruction Data
Recruitment agencies or job websites who may provide us with your application for a position at RDP Law.	Identity and Contact
The Law Society as part of a mentoring scheme.	Identity and Contact

#### **4. How we use your personal data**

##### **General legal basis of processing**

We will only use your personal data when the law allows us to. Most commonly, we will use your personal data in the following circumstances:

- Where we need to perform the contract we are about to enter into or have entered into with you (where you are our client or where there is a contract for you to provide us with services or goods).
- Where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests. An example of this would be where you are referred to in a matter on which we are advising or where you have applied to work for us.
- Where we need to comply with a legal or regulatory obligation, including for the purpose of preventing money laundering and / or terrorist financing

You can find out more about the types of lawful basis that we will rely on to process your personal data by looking at the Glossary at the end of this privacy notice.

### **Special Category Data**

We will only use your Special Category Data when the law allows us to. Most commonly, we will use your Special Category personal data in the following circumstances:

- In limited circumstances, with your explicit written consent (or the consent of the relevant data subject if that is not you).
- Where it is needed in the substantial public interest.
- Processing relates to personal data which you or (if you are not the relevant data subject) the data subject has made public.
- Processing is necessary for the establishment, exercise or defence of legal claims.
- Less commonly, we may process this type of information where it is needed to protect your interests (or someone else's interests) and you (or they) are not capable of giving consent

### **Consent**

Generally, we do not rely on consent as a legal basis for processing your personal data other than:

- i. when we process Special Category Data in connection with the registration for and provision of access to an event or seminar. Specifically, we may ask for health information to identify and be considerate of any disability or dietary requirement. We use such information based on your consent. If you do not provide information about disabilities or dietary requirements we will not be able to take appropriate steps to accommodate your disabilities or dietary requirements. You have the right to withdraw consent to our use of Special Category Data in connection with events and seminars by contacting us;
- ii. we will get your consent before sending direct marketing communications to you via email or text message. You have the right to withdraw consent to marketing at any time by contacting us; and
- iii. we may also ask for your consent in relation to the use of cookies on our website. See our cookie policy on our website for more information.

### **Purposes for which we will use your personal data**

We have set out below, in a table format, a description of all the ways we plan to use your personal data, and which of the legal bases we rely on to do so. We have also identified what our legitimate interests are where appropriate.

Note that we may process your personal data for more than one lawful ground depending on the specific purpose for which we are using your data. Please contact us if you need details about the specific legal ground we are relying on to process your personal data where more than one ground has been set out in the table below.

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Purpose/Activity	Type of data	Lawful basis for processing including basis of legitimate interest
To respond to initial enquiries about our legal services from prospective clients or officers / employees of prospective clients.	(a) Identity (b) Contact (c) Communications	(a) Performance of a contract with you  (b) Necessary for our legitimate interests (to be able to discuss our services with representatives of prospective clients)
(a) To register you as a new client; or  (b) To register an organisation for which you work as a new client, which includes carrying out identity checks, conflict checks and for the purpose of preventing money laundering and / or terrorist financing.	(a) Identity (b) Contact (c) Financial (d) Transaction (e) Instruction (f) Third Party (g) Communications (h) Special Category	(a) Performance of a contract with you  (b) Necessary to comply with a legal obligation
To provide legal advice and act generally in the matter on which we are instructed, including liaising with third parties on a client's behalf such as estate agents, land agents, experts, counsel, chambers for counsel, accountants, third parties to undertake property searches and others or using third party software, such as Adobe for e-signatures.  When we are instructed to act on a matter, we are likely to process both client personal data and third-party personal data. What data we process will depend on the type of case / client.	(a) Identity (b) Contact (c) Financial (d) Transaction (e) Instruction (f) Third Party (g) Usage (h) Communications (i) Special Category	(a) Performance of a contract with you  (b) Necessary to comply with a legal obligation  (c) Necessary for our legitimate interests (to be able to provide legal services in connection with the matter on which we are instructed)



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<p>To manage our relationship with our client which will include:</p> <p>(a) managing payments, fees and charges;</p> <p>(b) collecting and recovering money owed to us;</p> <p>(c) notifying our client about changes to our terms or privacy notice.</p>	<p>(a) Identity</p> <p>(b) Contact</p> <p>(c) Financial</p> <p>(d) Transaction</p> <p>(e) Instruction</p> <p>(f) Usage</p> <p>(g) Communications</p>	<p>(a) Performance of a contract with you</p> <p>(b) Necessary to comply with a legal obligation</p> <p>(c) Necessary for our legitimate interests (to recover debts due to us)</p>
<p>To respond to and consider an application for employment with RDP Law.</p>	<p>(a) Identity</p> <p>(b) Contact</p> <p>(c) Special category</p>	<p>(a) Necessary for our legitimate interests (to be able to consider and respond to your application)</p>
<p>To manage our relationship with a supplier, a lender panel or contractor or other third party.</p>	<p>(a) Identity</p> <p>(b) Contact</p> <p>(c) Financial</p> <p>(d) Instruction</p> <p>(f) Usage</p> <p>(g) Communications</p>	<p>(a) Necessary to comply with a legal obligation</p> <p>(b) Performance of a contract with you</p> <p>(c) Necessary for our legitimate interests (to manage our relationship with you)</p>
<p>To comply with our auditing requirements and enable lender panels or their third parties / assessors / accountants / regulators / insurers / banks or their third parties to undertake assessments for the purposes of security penetration testing, quality control, insurance, and regulatory compliance.</p>	<p>(a) Identity</p> <p>(b) Contact</p> <p>(c) Financial</p> <p>(d) Transaction</p> <p>(e) Instruction</p> <p>(f) Third Party</p> <p>(g) Special Category</p>	<p>(a) Necessary to comply with a legal obligation</p> <p>(b) Necessary for our legitimate interests</p>
<p>To provide mentoring services as part of formal mentoring schemes.</p>	<p>(a) Identity</p> <p>(b) Contact</p> <p>(c) Communications</p>	<p>(a) Necessary for our legitimate interests (to participate in mentoring scheme)</p>

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<p>To comply with our legal obligations, such as a requirement to report information to the National Crime Agency and / or the Office of Financial Sanctions Implementation. This may also include providing your details to our bank, Lloyds Bank, if they require it under Anti-Money Laundering legislation.</p>	<p>(a) Identity (b) Contact (c) Financial (d) Transaction (e) Instruction (f) Third Party (g) Usage (h) Communications (i) Special Category</p>	<p>(a) Necessary to comply with a legal obligation  (b) Necessary for our legitimate interests</p>
<p>To help prevent and detect crime and maintain security at our offices.</p>	<p>(a) CCTV Data (b) Identity (c) Special Category</p>	<p>(a) Necessary for our legitimate interests</p>

**Marketing**

We may use your Identity, Contact, Usage and / or Communications Data to form a view on what we think you may want or need, or what may be of interest to you. This is how we decide which products, services and offers may be relevant for you (we call this marketing). Further, we may contact you if you have appointed someone at RDP as executor of your will and that person leaves RDP, or dies.

You can ask us to stop sending you marketing messages at any time by contacting us at any time.

Where you opt out of receiving these marketing messages, this will not apply to personal data provided to us as a result of our instruction on a legal matter.

**Cookies**

You can completely disable cookies in your browser at any time. It is important to note that if you change your settings and block certain cookies, you will not be able to take full advantage of some features of our site, and we might not be able to provide some features you have previously chosen to use.

When you first visit our website you will be notified of our use of cookies and will be given the option to accept all cookies or opt in and out of specific groups of cookies via our preference centre. The preference centre is always accessible via a link in our Cookie Policy should you wish to change your settings at any time, this policy can be found on the footer of the homepage.

### **Change of purpose**

We will only use your personal data for the purposes for which we collected it, unless we reasonably consider that we need to use it for another reason and that reason is compatible with the original purpose. If you wish to get an explanation as to how the processing for the new purpose is compatible with the original purpose, please contact us.

If we need to use your personal data for an unrelated purpose, we will notify you and we will explain the legal basis which allows us to do so.

Please note that we may process your personal data without your knowledge or consent, in compliance with the above rules, where this is required or permitted by law.

### **5. Disclosures of your personal data**

We may share your personal data with the parties set out below for the purposes set out in the table in section 4 above:

- External Third Parties set out in the Glossary.
- Third parties to whom we may choose to sell, transfer or merge parts of our business or our assets. Alternatively, we may seek to acquire other businesses or merge with them. If a change happens to our business, then the new owners may use your personal data in the same way as set out in this privacy notice.

We require all third parties to respect the security of your personal data and to treat it in accordance with the law. We do not allow our third-party service providers (acting as our data processors) to use your personal data for their own purposes and only permit them to process your personal data for specified purposes and in accordance with our instructions.

### **6. International transfers**

In the normal course of doing business, we plan to store and process your personal data in the United Kingdom and / or European Economic Area. Sometimes, however, we may need to transfer information outside the European Economic Area.

In all circumstances, we make sure that appropriate protection is in place to transfer your information securely.

Please contact us if you want further information on the specific mechanism used by us when transferring your personal data out of the UK.

## **7. Data security**

We have put in place appropriate security measures to prevent your personal data from being accidentally lost, used or accessed in an unauthorised way, altered or disclosed.

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

## **8. Data retention**

### **How long will you use my personal data?**

We will only retain your personal data for as long as reasonably necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, regulatory, tax, accounting or reporting requirements. We may retain your personal data for a longer period in the event of a complaint or if we reasonably believe there is a prospect of litigation in respect to our relationship with you.

To determine the appropriate retention period for personal data, we consider the amount, nature and sensitivity of the personal data, the potential risk of harm from unauthorised use or disclosure of your personal data, the purposes for which we process your personal data and whether we can achieve those purposes through other means, and the applicable legal, regulatory, tax, accounting or other requirements.

Details of retention periods for different aspects of your personal data are available in our retention policy which you can request from us by contacting us.

In some circumstances we will anonymise your personal data (so that it can no longer be associated with you) for research or statistical purposes, in which case we may use this information indefinitely without further notice to you.

## **9. Your legal rights**

Under certain circumstances, you have rights under data protection laws in relation to your personal data. We have set out those rights below and you can find out more about them by reading the Glossary:

- Request access to your personal data.
- Request correction of your personal data.
- Request erasure of your personal data.
- Object to processing of your personal data.
- Request restriction of processing your personal data.
- Request transfer of your personal data.
- Right to withdraw consent.
- Right to make a complaint to the ICO at any time.

If you wish to exercise any of the rights set out above, please contact us.

**No fee is usually required**

You will not have to pay a fee to access your personal data (or to exercise any of the other rights). However, we may charge a reasonable fee if your request is clearly unfounded, repetitive or excessive. Alternatively, we could refuse to comply with your request in these circumstances.

**What we may need from you**

We may need to request specific information from you to help us confirm your identity and ensure your right to access your personal data (or to exercise any of your other rights). This is a security measure to ensure that personal data is not disclosed to any person who has no right to receive it. We may also contact you to ask you for further information in relation to your request to speed up our response.

**Time limit to respond**

We try to respond to all legitimate requests within one month. Occasionally it could take us longer than a month if your request is particularly complex or you have made a number of requests. In this case, we will notify you and keep you updated.

**10. Glossary**

<b>LAWFUL BASIS:</b>	
<b>Performance of Contract:</b>	means processing your data where it is necessary for the performance of a contract to which you are a party or to take steps at your request before entering into such a contract.
<b>Legitimate interests</b>	means where it is necessary for our legitimate interests (or those of a third party) and your interests and fundamental rights do not override those interests. An example of this would be where you are referred to in a matter on which we are advising.
<b>Comply with a legal obligation:</b>	means processing your personal data where it is necessary for compliance with a legal obligation that we are subject to.

**EXTERNAL THIRD PARTIES:**

Service providers who provide IT, system administration services, social media services, analytical tools and e-signature software. We will mainly use Adobe for e-signature tools, please refer to Adobe's website ([Adobe Privacy Centre](#)) for Adobe's Privacy Policy.

Professional advisers who provide services to us, including other lawyers, bankers, accountants, auditors, Lexcel and other accreditation assessors, insurers and insurance brokers, who may also employ their own third parties to audit us.

Other people / organisations who are connected to a matter on which we are instructed to advise, such as other lawyers, litigants in person, accountants, insurers, indemnity insurers, expert witnesses, lenders, lender panels and their third parties, counsel and their chambers / clerks, land agents, estate agents, search companies for property transactions and our bank, Lloyds Bank etc. We may use InfoTrack for property searches, please refer to InfoTrack's website ([InfoTrack](#)) for InfoTrack's Privacy Policy.

HM Courts & Tribunals Service, HM Revenue & Customs, the Solicitors Regulation Authority, HM Land Registry, the ICO and other regulators and authorities.

Organisations who provide services for money laundering checks, credit risk reduction and other fraud and crime prevention purposes and organisations providing similar services, including financial institutions, credit reference agencies and regulatory bodies with whom such personal data is shared. From May 2019 we will use SmartCredit Ltd <http://www.smartsearchuk.com> for the purposes of identity checks and anti-money laundering checks. SmartCredit undertake searches with Credit Reference Agencies in order to verify details put into the system. This will be a "soft" credit check and does not impact on credit ratings. Further, credit scores are not provided to the firm.

Public or legal bodies such as the Probate Registry, the Department for Work and Pensions, the Office of the Public Guardian, Local Authorities, Health boards, the National Crime Agency, Law Enforcement Authorities and the Office of Financial Sanctions Implementation.

<b>YOUR LEGAL RIGHTS - <u>in certain circumstances</u> you have the right to:</b>	
<b>Request access to your personal data (commonly known as a "data subject access request"):</b>	This enables you to receive a copy of the personal data we hold about you and to check that we are lawfully processing it.
<b>Request correction of the personal data that we hold about you:</b>	This enables you to have any incomplete or inaccurate data we hold about you corrected, though we may need to verify the accuracy of the new data you provide to us.
<b>Request erasure of your personal data:</b>	This enables you to ask us to delete or remove personal data where there is no good reason for us continuing to process it. You also have the right to ask us to delete or remove your personal data where you have successfully exercised your right to object to processing (see below), where we may have processed your information unlawfully or where we are required to erase your personal data to comply with local law. Note, however, that we may not always be able to comply with your request of erasure for specific legal reasons which will be notified to you, if applicable, at the time of your request.
<b>Object to processing of your personal data:</b>	This enables you to object to processing of your personal data where we are relying on a legitimate interest (or those of a third party) and there is something about your particular situation which makes you want to object to processing on this ground as you feel it impacts on your fundamental rights and freedoms. You also have the right to object where we are processing your personal data for direct marketing purposes. In some cases, we may demonstrate that we have compelling legitimate grounds to process your information which override your rights and freedoms.

<b>Request restriction of processing of your personal data:</b>	<p>This enables you to ask us to suspend the processing of your personal data in the following scenarios:</p> <ul style="list-style-type: none"><li>• If you want us to establish the data's accuracy.</li><li>• Where our use of the data is unlawful but you do not want us to erase it.</li><li>• 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.</li></ul> <p>You have objected to our use of your data but we need to verify whether we have overriding legitimate grounds to use it.</p>
<b>Request the transfer of your personal data to you or to a third party:</b>	<p>We will provide to you, or a third party you have chosen, your personal data in a structured, commonly used, machine-readable format. Note that this right only applies to automated information which you initially provided consent for us to use or where we used the information to perform a contract with you.</p>
<b>Withdraw consent at any time:</b>	<p>You may withdraw consent at any time where we are relying on consent to process your personal data. However, this will not affect the lawfulness of any processing carried out before you withdraw your consent. If you withdraw your consent, we may not be able to provide certain products or services to you. We will advise you if this is the case at the time you withdraw your consent.</p>

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